Canada – British Columbia

TIDSA

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Pacific Rim Tourism Development Strategy

BACKGROUND/TECHNICAL REPORT

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Pacific Rim Tourism Development Strategy

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PREFACE

This study was funded through the studies and planning program of the Canada-British Columbia Travel Industry Development Subsidiary Agreement (TIDSA) dated October 17, 1978. The Agreement, which provides a variety of programs for tourism development, is cost shared equally by the Governments of Canada and British Columbia through the Department of Regional Industrial Expansion and the Ministry of Industry and Small Business Development respectively. This study was administered jointly by the Ministry of Industry and Small Business Development and the Ministry of Tourism, and managed by a joint Federal/Provincial Committee.

The Consultants acknowledge with gratitude the assistance and cooperation received from the numerous government and private organizations and individuals during the preparation of this report.

The report and its conclusions is the sole responsibility of the consultants, and does not necessarily reflect the opinions of those who assisted during the course of this investigation and the Federal and Provincial Governments which funded the study.

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Department of Regional
Industrial Expansion

Ministry of Industry
and Small Business
Development

Ministry of Tourism

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1.0 INTRODUCTION

1.1 OVERVIEW

The Alberni-Clayoquot Regional District is a 7,700 km^2 segment of the Vancouver Island Tourism Region (refer to Figure 1). For both the island and the region the principal industries are forestry, fishing, services and tourism. However, with declines in the two primary sectors during the past few years, tourism has taken a higher profile because of its ability to:

- generate jobs with a relatively low capital investment;
- increase tax revenue;
- contribute to a more balanced economy; and
- assist in the transfer from primary/secondary industries to service industries.

Vancouver Island itself is one of Canada's major international destinations (3.2 million in 1983)[1] and Pacific Rim National Park is a national destination within the Island. The region can therefore appeal to two markets:

- those attracted to the Island but essentially interested in any one of the other attractions (i.e. Victoria, Campbell River, Island Highway, Qualicum Beach/Parksville, etc.); and
- those attracted to the unique natural beauties of the Long Beach/Barkley Sound area.

Three sources of Island-bound tourists are of interest to the Alberni-Clayoquot Region:

- those staying in the Qualicum Beach/Parksville Area;
- those going through Nanaimo as part of a Vancouver-Nanaimo-Victoria circuit; and
- those heading for Campbell River.

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[1]Alex Tunner estimate, B.C. Research, 1982 Tourism Model

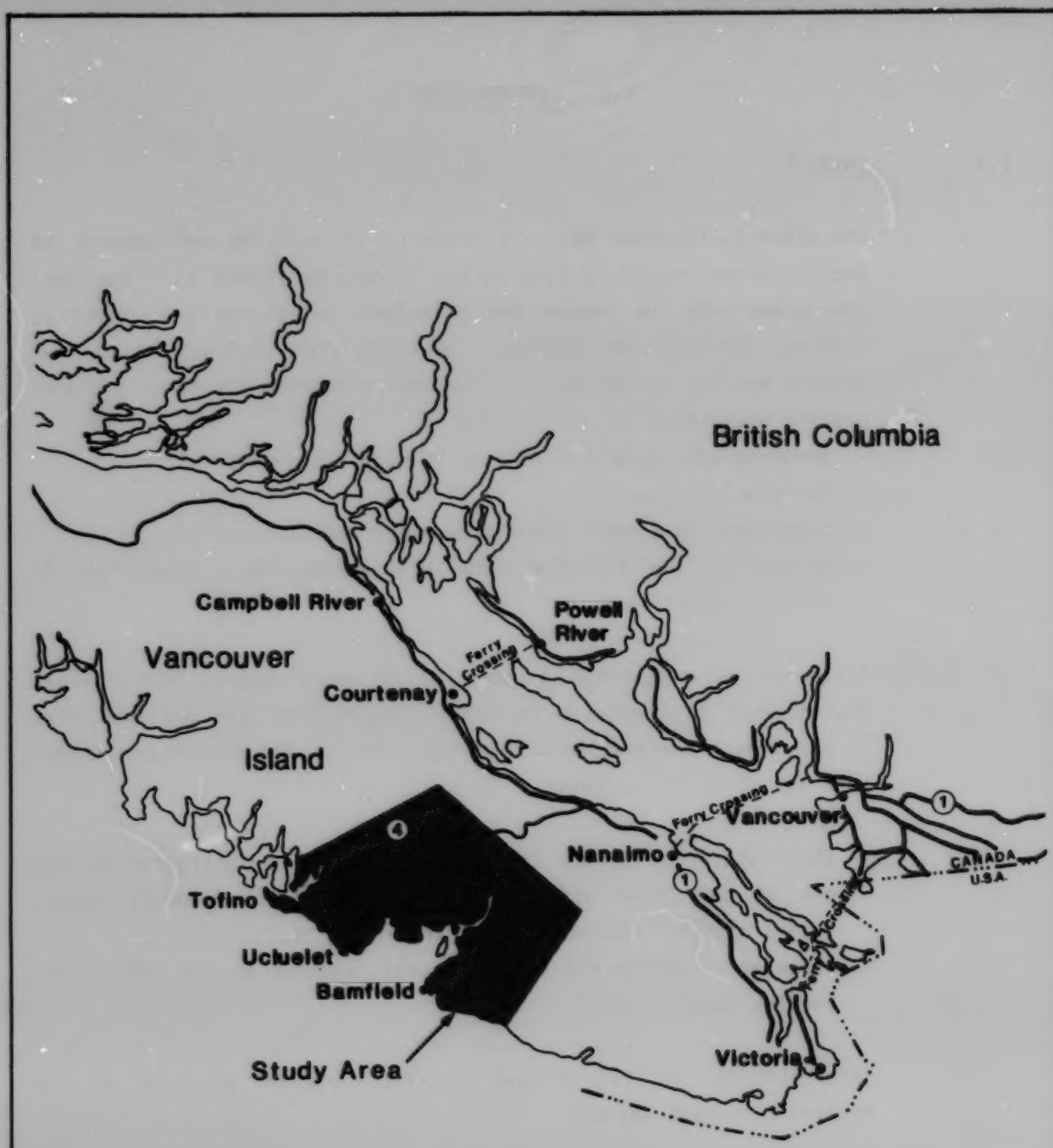

Figure 1

Location Plan

MacLAREN PLANSEARCH

For those segments interested in a "classic" west coast experience the Tourism Development Strategy will seek to provide the access attractions, services, and circuits to make the region a year-round national destination.

1.2 THE REGION

The Alberni-Clayoquot Region presently offers the tourist a mix of opportunities that epitomize both Vancouver Island and "Super-Natural" British Columbia. Mountain terrain, rising to 1400 m, long sandy beaches, Pacific rainforest, hundreds of kilometres of rugged coastline edged by inlets, sounds and channels, and islands, as well as abundant marine life including whales and sea lions, provide a parquet of features that appeal to many market segments.

Tourism development has, to date, not been extensive. There are only two destination type resort facilities (near Tofino), inadequate camping facilities and no significant man-made attractions. Although there are enough average quality motels to meet present demand, the private sector has been unable to supply upscale or high quality accommodation units.

1.3 THE REGIONAL TOURISM STRATEGY

The preparation of a Regional Tourism Development Strategy is an effort to identify the issues and trends, opportunities and constraints, and produce a plan of action for all components of the tourism industry over the next 10 years.

The strategy consists of two documents; this Background Report and a Master Plan Report including an Implementation Strategy. The Background Report provides the inventory and analysis of the tourism resources, a synthesis of all available market research and a classification of the results of our on-site interviews. It also presents potential development opportunities and three alternative concepts.

All major attractions and services were visited and their role in the overall tourism industry was assessed. The operators of most of these facilities were interviewed to find out their attitudes toward the existing travel industry as well as their perception of the needs and the future orientation of tourism in the region. Also, many other individuals including local politicians and business people, provincial civil servants, community leaders, etc., were contacted to present their ideas on tourism and its role in the overall growth of the region. More than 15 documents containing a variety of market data were scrutinized and synthesized to determine market characteristics. As well, a two week visitor survey was conducted in the months of July and August. Using three different approaches, a more accurate estimation of total visitation was made.

The analysis of natural and cultural resources and the existing and potential markets identified a series of issues, trends and several possible development opportunities.

This report then concludes with the presentation of three alternative development concepts and a number of images or themes that will provide orientation to the the final master development strategy.

1.4 POLICY AND AGENCY IMPACTS OF TOURISM

Tourism development at the regional level is a result of the interaction between the travel industry and a number of government agencies including - federal government agencies, provincial government agencies, local government, the Regional District of Alberni-Clayoquot and the Electoral Areas.

• FEDERAL GOVERNMENT

Federal involvement in tourism is mostly through the efforts of Tourism Canada (Department of Industry, Trade and Commerce). Tourism Canada has previously been responsible for promotion, research and

policy and planning but is now assuming a role in the provision of financial incentives and participation in the development of attractions and services. It also provides advisory services to the industry.

The new Department of Regional Industrial Expansion, through Tourism Canada, is also assuming a major role by promoting regional economic development opportunities based on tourism.

In the Alberni-Clayoquot Region, Parks Canada (Dept. of the Environment) is a major contributor to the development and maintenance of Pacific Rim National Park. The Department of Fisheries and Oceans is responsible for the protection and enhancement of the fishery resources.

One of the most important contributions to the travel industry in B.C. and the Region has been made by TIDSA,[2] the recently completed sub-agreement between the provincial and federal governments.

- PROVINCIAL AGENCIES

The Ministry of Tourism (formerly Ministry of Tourism and Small Business Development) or Tourism B.C. has been a major provincial actor in the development of tourism. They have no official goals but a summary of operating principles are outlined in the B.C. Travel Industry Technical Report (Phase 1).

- LOCAL GOVERNMENT

Each municipality in the region has made a contribution to tourism through:

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[2]Canada-British Columbia Travel Industry Development Subsidiary Agreement.

- involvement in attraction development;
- accommodating tourism in their community plans;
- providing information services; and
- supporting community special events.

Port Alberni has shown significant initiative in its efforts to develop Harbourfront and its close collaboration in working with the Harbour Commission.

- REGIONAL DISTRICT

Tourism is not necessarily a part of a Regional Districts' mandate, however, the Regional District of Alberni-Clayoquot has shown a particular interest through:

- the preparation of a Regional Tourism Strategy
- developing certain attractions (Della Falls, Mt. Arrowsmith)

- ELECTORAL AREAS

Electoral Districts have no tourism function but collaborate with the Regional District and adjacent municipalities in planning and development in unincorporated areas.

The role and responsibilities of various local government agencies are outlined in Figure 2.

ROLE AND RESPONSIBILITIES OF LOCAL ALBERNI-CLAYOQUOT AGENCIES IN TOURISM

	Municipalities			REGIONAL DISTRICT	NATIVE BAND COUNCIL	TRIBAL COUNCIL
	Tof.	P.A.	Ucl.			
PLANNING						
Research Studies		0		●	0	●
Policy/Plan Formulation	0	0	0	●	0	●
Regulation/Control	0	0	0	●	0	0
Coordination		0		●		●
DEVELOPMENT						
Incentives		●		0	0	●
Advisory Services		0		●		●
Accommodation		●			0	
Food and Liquor						
Outdoor Recreation	0	0	0	●	0	0
Transportation		●		0		
Infrastructure	●	●	●		0	
Preservation/Conservation	●	●	●	●	●	
Events/Attractions	0	●	0		0	●
OPERATIONS						
Management		●		0	0	
Incentives		0		●		
Training						
Advisor				0		
PROMOTION						
Pamphlet	0	●	0			
Media		0				
INFORMATION						
Centers		●	●			
Services	0	0	0			

HIGH INVOLVEMENT ●
MODERATE INVOLVEMENT 0
NO INVOLVEMENT

FIGURE 2

Role/Responsibilities of Federal Agencies in the Tourism Industry

Source: British Columbia Travel Industry Study - Technical Report Phase I (Revised)

● Predominant Condition

○ Secondary Condition

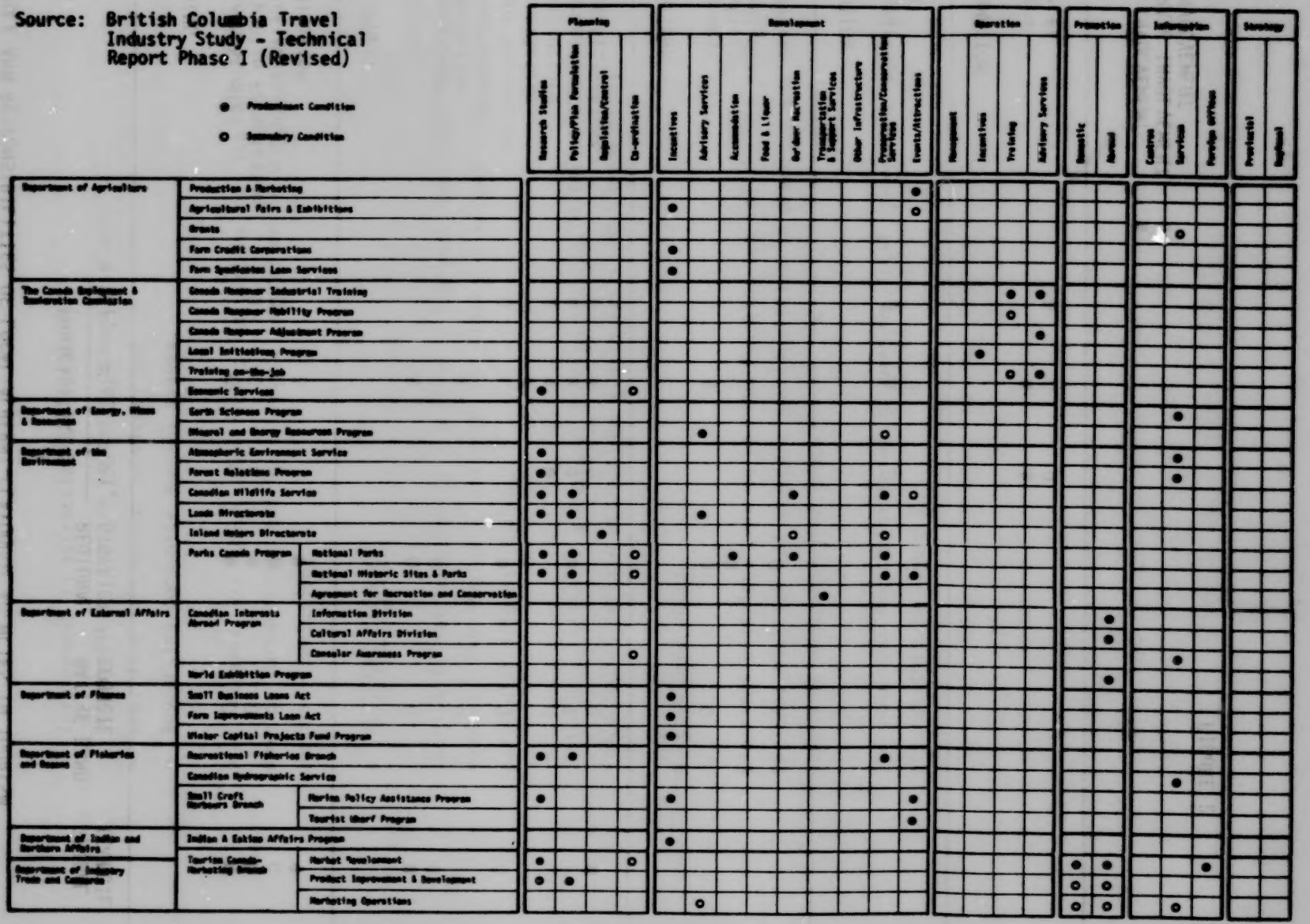

Figure 2.1a

Roles/Responsibilities of Federal Agencies in the Tourism Industry

Source: British Columbia Travel Industry Study - Technical Report Phase I (Revised)

● Predominant Condition

○ Secondary Condition

			Planning				Development									Operation				Promotion		Information			Strategy	
			Research Studies	Policy/Plan Formulation	Regulation/Control	Co-ordination	Incentives	Advisory Services	Accomodation	Food & Liquor	Outdoor Recreation	Transportation & Support Services	Other Infrastructure	Preservation/Conservation Services	Events/Attractions	Management	Incentives	Training	Advisory Services	Domestic	Abroad	Centres	Services	Foreign Offices	Provincial	Regional T.D.C.
Dept. of Industry, Trade & Commerce	Canadian Government Office of Tourism Policy, Planning & Industry Relations Branch	Planning & Research	●	●		●																				
		Industry & Gov't Relations				○																				
	Federal Business Development Bank	Management Services														○		●	●				●			
		Financial Assistance					●																			
	Trade Industrial Program	Program Office - Industry														○		●								
		Office of Design						●																		
Department of National Health & Welfare	Fitness and Amateur Sport Program	Sport Canada					●																			
		Recreation Canada					○																			
	Income Security & Social Assistance Program New Horizons																●									
Department of Regional Industrial Expansion	Subsidiary Agreements to General Development Agreements		○	○		○	●											●								
	Regional Development Incentives Act						●											●								
	Agricultural & Rural Development Act		○	○			●																			
	Special A.R.D.A.						●					●	●													
	Special Areas Agreement		○	○			●					●	●													
Secretary of State	Bilingualism Development Program Youth Exchange																			○						
	Arts & Cultural Program						●								●											
	Citizenship Program	Multiculturalism & Group Understanding					●																			
		Hostel & Information Services					●																●			
	Canada Council	Social Sciences & Humanities	●																							
		Cultural Exchange																			○					
		UNESCO	●																							
		Arts Program					●																			
Ministry of Transport	Airport Assistance Program											●														
	Air Tourist Information Canada																						●			
	Hospitality, Interpretation, Information Services																						●			
	Market Research at Airport Terminal		●		○																					
	Surface Transportation Program		●			●																	●			
Other Agencies	Canadian International Development Agency																				●					
	Canadian Radio-Television & Telecommunications Commission																			○			○			
	Canadian Transport Commission		●		●							●														
	Department of Consumer and Corporate Affairs				●																		○			
	Heritage Canada		○					○						●	●								●			
	International Boundary Commission				●										●											
	International Joint Commission		●				●																			
	Department of National Defence														●											
	Department of National Revenue, Customs & Excise Branch		●																				○			
	Royal Canadian Mounted Police														●						●					
	Statistics Canada		●			○																				

Figure 2.1b

Roles/Responsibilities of Provincial Agencies in the Tourism Industry

Source: British Columbia Travel Industry Study - Technical Report Phase I (Revised)

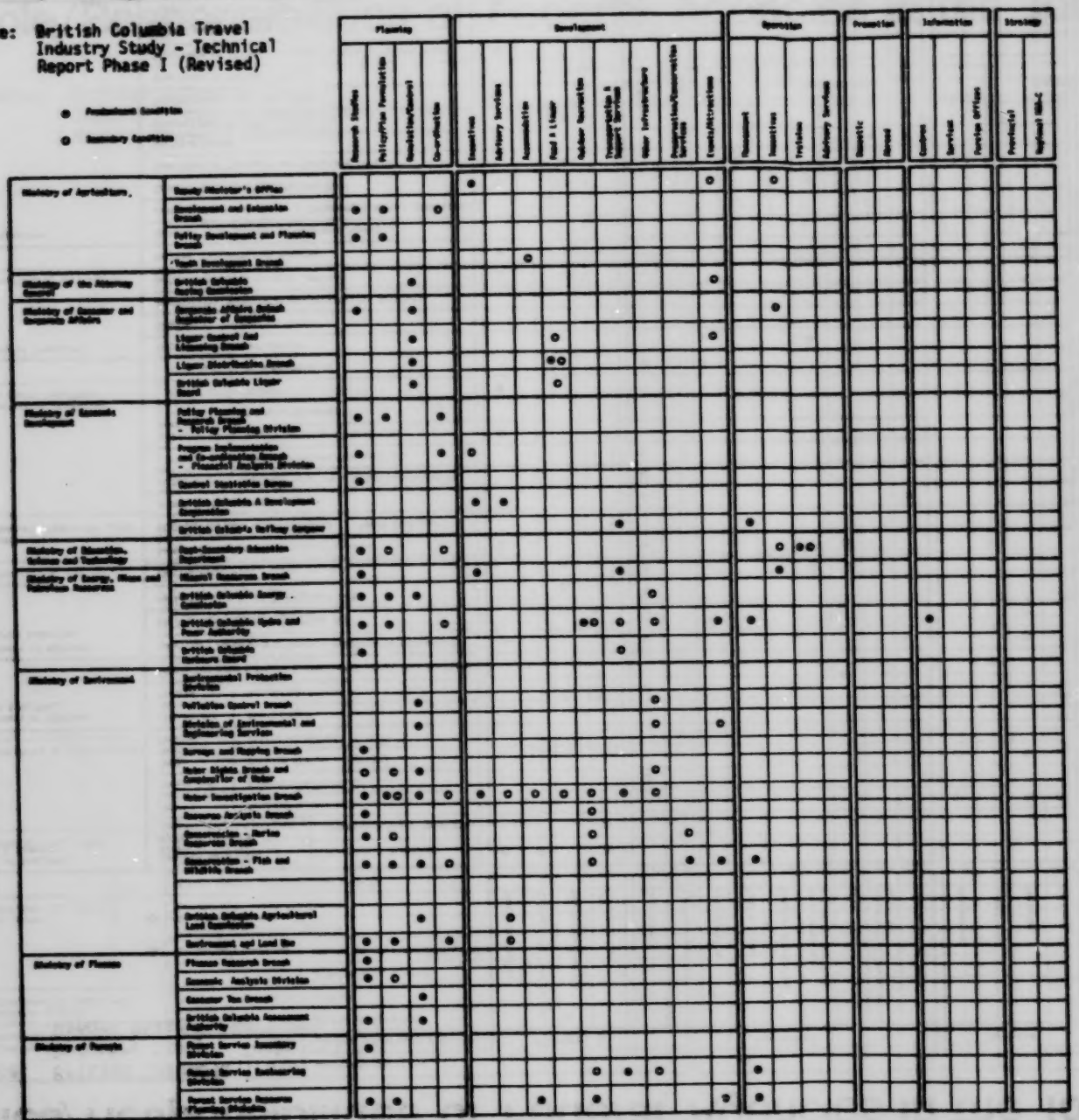

Figure 2.2a

Roles/Responsibilities of Provincial Agencies in the Tourism Industry

Source: British Columbia Travel Industry Study - Technical Report Phase I (Revised)

● Predominant Condition

○ Secondary Condition

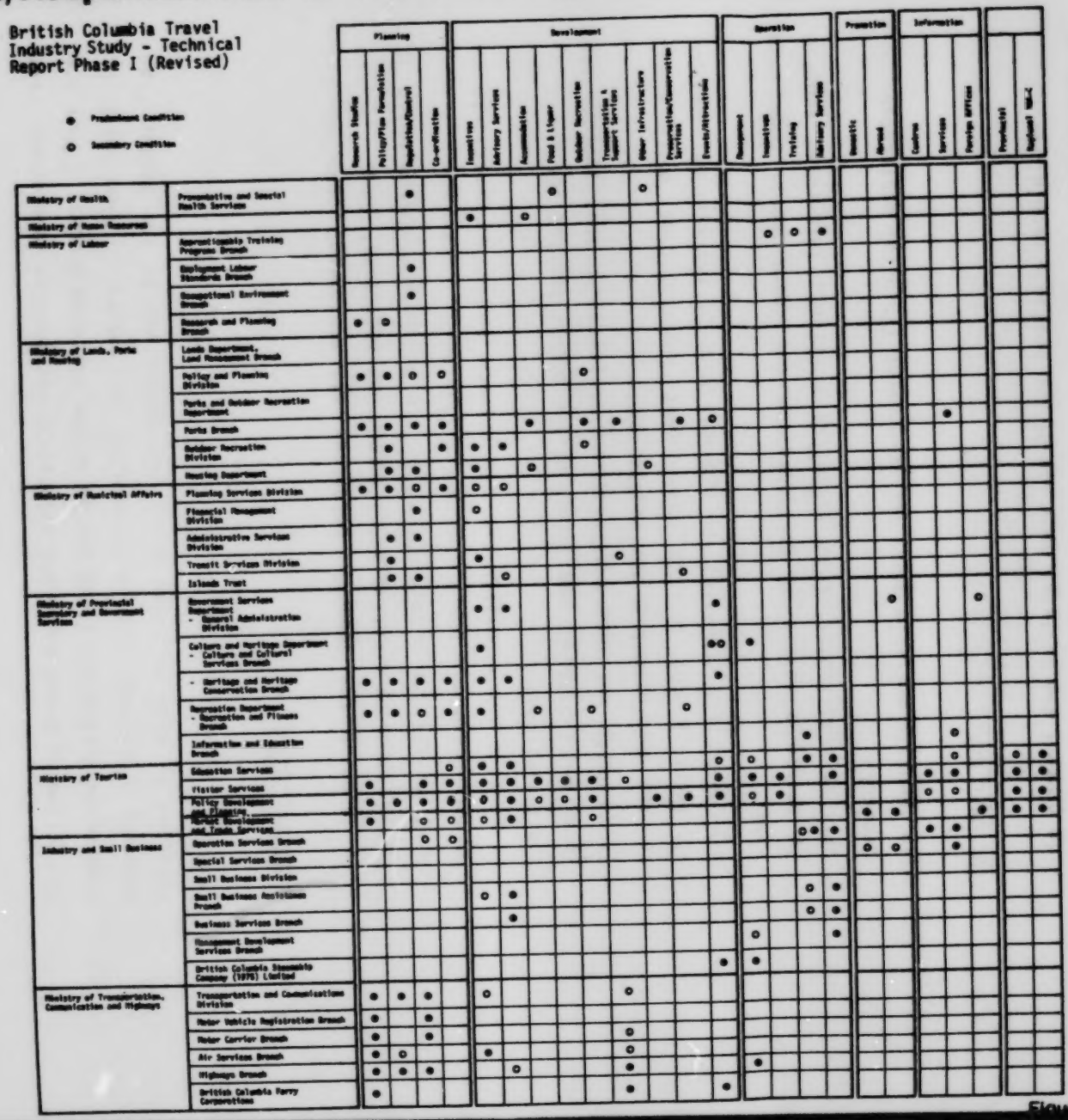

Figure 2.2b

2.0 GOALS AND OBJECTIVES

The following broad goals and objectives for Tourism development have been noted during the first phases of the planning process. They are economic, cultural and environmental in nature. They will be followed by more detailed goals and objectives at the Master Plan level.

2.1 ECONOMIC GOALS

- To increase the economic potential and employment opportunities for citizens by creating added income and additional jobs.
- To diversify the economic base of the region's industry which is largely dependent upon forestry and fishing.
- To provide opportunities for the private sector to contribute to the travel industry.
- To extend the length and impact of the summer tourist season.
- To identify and locate attractions and services that support the tourism development of the region.
- To identify the tourism development opportunities which could strengthen and diversify the economic base of the various communities.
- To create a spirit of collaboration and coordination among the various municipalities to establish a strong, integrated tourism product.
- To identify possible areas for government financial assistance.

2.2 CULTURAL GOALS

- To protect the cultural heritage of the Region's people.
- To ensure development that is in keeping with the aspirations of the residents.
- To develop a greater awareness of local history and heritage.
- To increase recreational facilities and opportunities for residents.

2.3 ENVIRONMENTAL GOALS

- To protect and conserve environmentally sensitive areas.
- To create an awareness of the unique character and the natural attractions of the region.

3.0 NATURAL RESOURCES

3.1 GENERAL DESCRIPTION

The region's greatest asset is its natural resources. "Here, Nature Still Reigns" is a theme that is continually expressed throughout the region. Nowhere does it reign more supreme than in Pacific Rim National Park. The park is not only the major attraction but is also the essence of the image held by many of the tourists to the region.

Each park component expresses a distinct part of that image - Barkley Sound with its protected islands, wildlife (sea lions, whales, birds), sailing, diving and fishing, the West Coast Trail with its rugged "west" coast character and especially Long Beach and its miles of surf-swept sand beaches where well-weathered logs create a distinctive edge between the smooth sands and tangled rainforests. The interior of the region is also nature based with 90% of the landscape still undeveloped despite the fact that logging activities have drastically altered the vegetation cover over one third of the land.

Logging has nevertheless rendered much of the interior lands accessible via a complicated network of logging roads and shoreline access points (Alberni Inlet, Kennedy Lake). The lakes are the focus of tourism in the interior providing opportunities for boating, fishing and hiking to such remote natural features as Della Falls. The mountains, although dramatic and rugged tend to support the overall theme rather than provide many opportunities. Although the development potential of the mountains is limited they provide the visual backdrop and spatial context that is so important to a semi-wilderness type visitor experience.

Even the municipalities have direct links to the natural resources by either their industries (Port Alberni, Ucluelet) or their aesthetic setting (Tofino, Bamfield).

More specifically, each of the municipalities relates to its natural base in its own way.

Port Alberni is at the hub of a number of natural arms that radiate out from it or around it. To the direct south is the Alberni Inlet, Sproat Lake to the west, Great Central Lake (northwest), Stamp River (north) and Mt. Arrowsmith (east).

Tofino is the service focus of Clayoquot Sound with ready access to Meares Island, Hot Springs Cove, and Stubbs Islands. As well, its attractive visual quality is created by the Village's setting in Tofino Inlet.

Ucluelet is a staging area for the fishing, nature interpretation and sightseeing in Barkley Sound. Although it has its own beaches the main activity is centered on the Ucluelet Inlet and its commercial/ industrial activity.

Bamfield provides a southeast access to Barkley Sound but is more readily characterized by its setting amongst such idyllic yet spectacular resources as Pachena Bay, Brady's Beach, Cape Beale, the Deer Group, etc. Bamfield's location at the northern limit of the West Coast Trail links it directly with the natural resources of that Parks Canada facility.

In conclusion, each of the four communities, is bound to its natural base in a variety of ways and in a manner that reflects the natural diversity of the Alberni-Clayoquot Region.

3.1.1 Climate

Both the Coastal Units, Alberni Inlet and Port Alberni are subject to Marine West Coast Climatic conditions with cool to warm summers (14°C to 16°C in July) and mild winters (0°C - 5°C January). Both seasons have high rainfall with approximately 3000 mm (120 in.) per year. Strong winds are frequent on the coast especially in the winter. Complete climatic data are found in Appendix I.

3.2 DEVELOPED AREAS

3.2.1 Parks: Descriptions

Park facilities, activities and markets are presented in Figure 3.

3.2.1.1 National Parks

Canada's national parks are set aside for the use by the people of Canada and the world and for the preservation of the natural resources within their boundaries. The staff of the national parks have a responsibility to welcome and encourage all visitors but, at the same time, they must manage the park so it remains unimpaired for future generations. This dual mandate, preservation and use, illustrates the relationship between man and the landscape that must be very carefully addressed in planning for tourism.

Parks Canada offers recreational opportunities that are closely related to observing and learning about the natural environment. Activities such as hiking, canoeing and bird-watching are encouraged while major commercial outlets and amusement parks generally are discouraged.

Pacific Rim National Park, facing the open Pacific Ocean on the west coast of Vancouver Island, is the only National Park on the west coast of Canada.

3.2.1.1.1 Pacific Rim National Park

Pacific Rim National Park, the first National Marine Park in Canada, is the major attraction and destination in the Regional District of Alberni- Clayoquot and the reason for most visits. It lies in a long, narrow strip along the west coast of Vancouver Island 113 km west of Port Alberni, near the end of Highway 4. Because of its location it draws visitors through the region from the Port Alberni area and from the region's entrance.

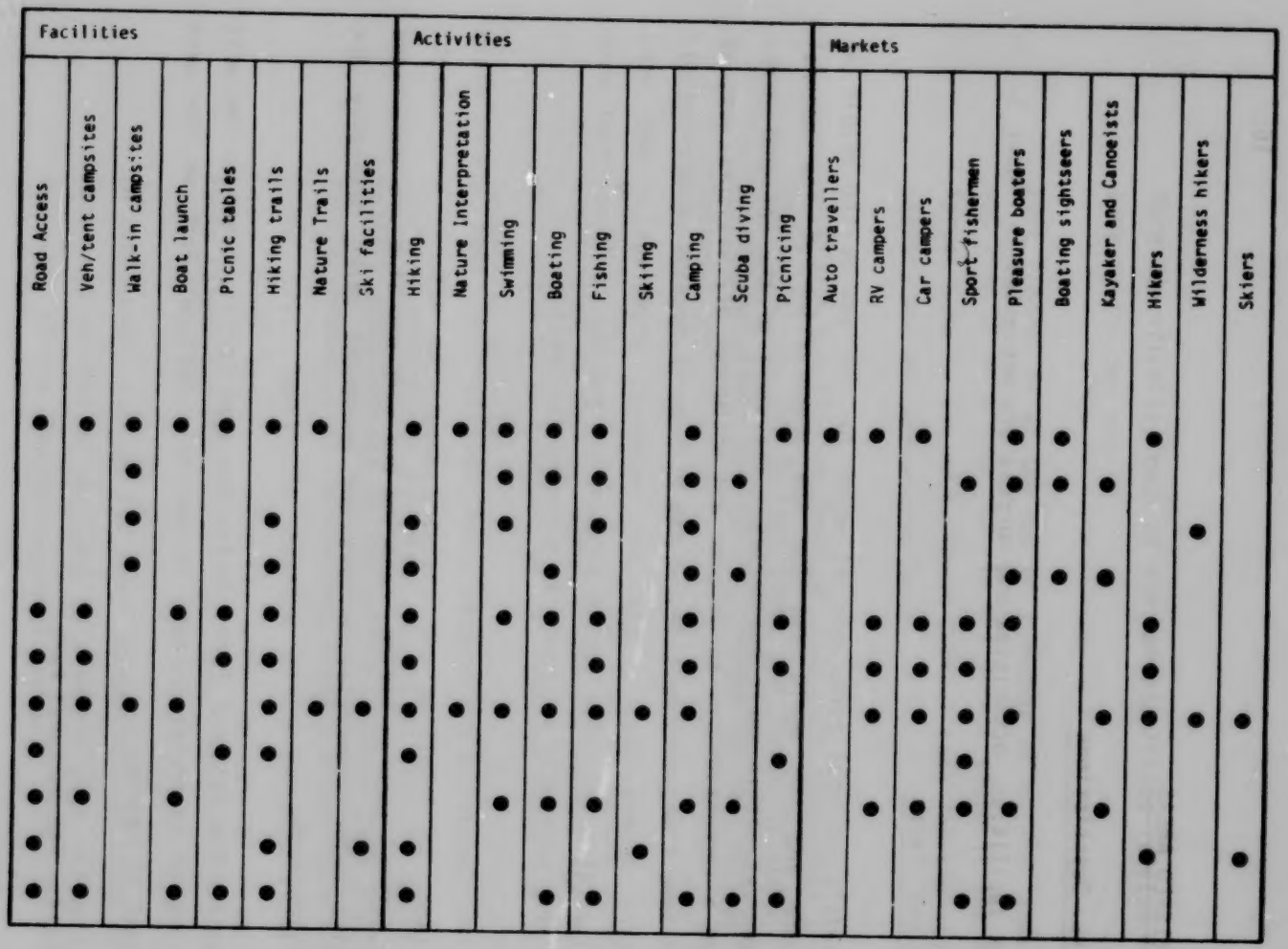

FIGURE 3

Facilities, Activities and Markets of Parks in the Regional District of Alberni-Clayoquot

Clinging to Canada's rugged west coast, the surf-swept beaches, rocky headlands and craggy islands of the park are bathed by the Pacific Ocean - and battered by its fury. Plentiful moisture and a long, temperate growing season have produced a dense forest of tall trees that drape the landscape in a deep, dark green. Sitka spruce are found nearest the ocean while further inland there are cedar, hemlock and fir. Beneath the umbrellas of the larger trees is a virtually impenetrable carpet of salal, salmonberries and huckleberries.

The numerous large, marine animals that can be found in or near the park include gray whales, sea lions and porpoise. Large land animals are less common but black bears, black-tailed deer and cougars have been seen as well as smaller animals like raccoons, red squirrels and deer-mice. Some of the more common shorebirds are great blue herons, bald eagles, cormorants and seagulls while woodpeckers, Stellar's jays, and chickadees can be found in the forests.

Barkley Sound divides the park into three different areas.[1] Each area has its distinct terrain, is separated from the other by expanses of open water, has varying levels of accessibility and offers very different recreational experiences. The three areas or units are:

- Long Beach;
- the Broken Group Islands; and
- the West Coast Trail.

The Long Beach unit is named for the 11 km stretch of hard, sandy beach and rocky headlands. It is directly accessible by road from Port Alberni, is the main attraction of the region, and is a short distance from the conveniences of Tofino and Ucluelet. The Broken Group Islands unit of the park is a cluster of about a hundred small, wooded islands located in Barkley Sound. They are accessible only by boat and are very popular with fishermen, boaters, sightseers, kayakers and divers. The West Coast Trail unit of the park is a narrow band of heavily forested wilderness stretching along the coast

[1]"Pacific Rim National Park - Long Beach Unit". Provincial Master Plan; Parks Canada, Planning Division, 1973

southeast of Barkley Sound. The area is attracting an increasing number of backpackers (6,000 in 1981) and is accessible only by trail. Each of these three areas is described in greater detail in the following sections.

- Long Beach Unit

This section of the park is named for an 11 km crescent of beach and rocky headlands facing the open Pacific Ocean.

At low tide beachcombers browse the refuse cast up by the sea - twisted driftwood, colourful shells and glass fishing floats that winds and currents have pushed all the way from Japan. At the high tide line the beach is choked with logs once destined for coastal sawmills.

In the winter, Pacific storms pound the beaches, drench the forests with rain and wrap the landscape in damp gray fog and offer a tourist experience that contrasts with the more passive summer surf.

Behind the beach stand the dense rain forests of sitka spruce and salal that thrive in the fog and rain. Radar Hill, a viewpoint near the north end of the park affords splendid panoramic views from the rugged coast to the blue green slopes of Meares Island and the Mackenzie Range.

Across the Esowista Peninsula, Grice Bay provides a boat ramp and views of broad expanses of mudflats and the protected waters and forested islands of Clayoquot Sound.

The development of the park has changed Long Beach from an unobstructed recreation facility into a safe, organized family attraction. In the 1960's, there were no restrictions on the use of the beach and strollers had to compete with speeding cars, motorcycles and frequent groups of noisy people. Vehicles are no longer permitted on the beaches, camping in the park is restricted to two small campgrounds and wardens patrol the park.

There are two campgrounds in the Long Beach Unit. Greenpoint campground provides vehicular access to 96 campsites on a terrace several hundred feet above and about a quarter of a mile back from Long Beach. The campsites are fairly well dispersed, separated by 50 to 75 feet of thick underbrush. The sites are visually isolated from one another and some are within view and earshot of the beach. The Schooner Cove campsite is a primitive, walk-in facility on the north end of Long Beach.

There are several picnic sites close to the parking lots along Long Beach.

Seven hiking trails are in the Long Beach Unit. All but the interpretive trail provide access from the various parking lots to the beaches or across some of the headlands between the beaches. The Rain Forest Self-Guiding Interpretive trail provides two short loops through a coastal rain forest untouched by man.

Other services offered by the Parks Interpretive service include a variety of nature interpretation programs, rainy day programs centred around the beaches and a viewpoint on Radar Hill. An Interpretive theatre will soon be opened at the Wickaninnish Center featuring films about the natural environment of the area.

The Tofino Airport is an enclave within the Long Beach Unit that is administered by the Federal Department of Transport. Its concrete 2670 m (5000') runways were built during World War II and can handle large, commercial aircraft. It is IFR equipped, centrally located between Tofino and Ucluelet, and could provide an important link with Vancouver, Seattle and other centers on the island.

- Broken Group Islands Unit

Barkley Sound is a major break in the mountains, and separates the communities of Ucluelet and Bamfield and leads into Port Alberni by way of Alberni Inlet. The Broken Group Islands Unit consists of about a hundred small islands in the Sound.

Pacific grey whales can be seen near the islands as well as at feeding grounds off Long Beach. Killer whales are often seen in Barkley Sound and Harbour seals inhabit the islands' sheltered lagoons. Pelagic cormorants and more than 170 pairs of bald eagles nest among the islands. The numerous shipwrecks attract scuba divers and there is good fishing for coho and chinook salmon.

Most visitors travel to the islands from Ucluelet, Toquart Bay, Port Alberni and Bamfield. In the summer the Lady Rose carries visitors between Port Alberni, Gibraltar Island, Bamfield and Ucluelet.

The irregular shorelines of the islands offer many miles of sheltered waters. The only facilities that are provided are seven small primitive campsites near freshwater supplies on seven of the islands and emergency help and information at a floating warden station anchored in a sheltered bay on the southwest shore of Nettle Island. The four Indian Reservations among the islands are not for public use.

- The West Coast Trail Unit

The West Coast Trail Unit, between Bamfield and Port Renfrew, is a narrow band of headlands, beaches and rain forest more than 70 km long. Along the coast are waterfalls, sea caves, weathered rock arches, water-blasted blowholes, and tidal pools inhabited by barnacles, mussels, limpets and hermit crabs. Facilities provided in the unit include the West Coast trail, a reconstructed version of a life-saving trail built earlier in the 20th century to provide a means of access for shipwrecked mariners, trailhead information, registration and parking at Pachina Bay.

The area is used by two types of backpackers:

- those who do the complete trail (3,000 in 1981); and
- those who take a two to three day hike to the falls (3,000 in 1981).

The following is a summary of the facilities, activities and markets of the 3 units within Pacific Rim National Park:

Unit	Facilities	Activities	Markets
LONG BEACH	Campsites (96) Primitive campground (1) Picnic sites Hiking trails Interpretive trails Roads Interpretive centre Viewpoint Tofino Airport	Beachcombing Hiking Nature interpretation Birdwatching Photography Surfing Scuba diving Fishing Whale watching Camping, Boating and Swimming (Kennedy Lake)	Auto travellers RV campers Beach enthusiasts Swimmers
BROKEN GROUP ISLANDS	Primitive campgrounds (7)	Pleasure boating Fishing Sightseeing/Exploring Whale watching Kayaking Camping	Boaters Sightseers Fishermen, kayakers and canoeists Archaeologists
WEST COAST TRAIL	Hiking trails Primitive campground	Hiking Photography Bird watching Beachcombing Swimming (Tsusiat Falls)	Wilderness backpackers

3.2.1.2 Provincial Parks

3.2.1.2.1 Maquinna

Located in Hot Spring Cove, approximately 45 km northwest of Tofino, the park is named after the great chief who led the Nootka when Europeans first arrived on the west coast at the end of the eighteenth century. It contains undeveloped hotsprings whose 50°C water cascades through a series of pools to the cool waters of the ocean.

Access is by boat or float-equipped aircraft as there are no roads. A short trail (1 km) to the hotsprings begins at the Government wharf.

Facilities	Activities	Markets
Government wharf	Bathing	Boaters
Walking trail	Walking	Fly-ins
Walk-in campground	Fishing	

3.2.1.2.2 Sproat Lake

This park is located on the north shore of Sproat Lake 13 km north west of Port Alberni on Highway 4. This warm, sunny lake is noted for its swimming, fishing, water-skiing and boating. Visitors with an interest in the cultural heritage of Vancouver Island may enjoy a pleasant walk to view ancient Indian rock carvings (petroglyphs).

Access is by paved road from Port Alberni. Trailer park, resorts and boat rentals are nearby.

Facilities	Activities	Markets
Campsites (57)	Swimming	Camping travellers
Picnic tables	Boating	Picnickers
Boat launching ramp	Fishing	Boaters
Walking trails	Camping	Fishermen
Change house	Picnicking	
	Heritage viewing	

3.2.1.2.3 Stamp Falls

This park, named for the pioneer who built Alberni's earliest sawmill, is located 14 km north of Port Alberni on Beaver Creek road. Visitors can camp, picnic or relax near the waterfalls. During the summer they can watch the salmon climb the fish ladders. There are beautiful walks in the area as well as swimming in the river and steelhead and cutthroat trout for the fishermen.

Facilities	Activities	Markets
Serviced campsites (20)	Camping	Camping travellers
Picnic tables (16)	Picnicking	Picnickers
Walking trails	Walking	Fishermen
Fish ladders	Swimming	
	Fishing	
	Trail Riding	

3.2.1.2.4 Strathcona

Strathcona Park is the oldest Provincial Park in B.C. and the largest on Vancouver Island. About a quarter of its area is within the Regional District of Alberni-Clayoquot. Within the park are Della Falls, the highest falls in North America and the sixth largest in the world. There are also mountain peaks and deep valleys, alpine terrain, rivers, creeks, streams, glaciers and awe-inspiring forests. It is also a wildlife sanctuary, with most species of mammals and birds that live on the island represented.

Naturalists marvel at the alpine flowers of early summer that spread their glory through various meadows; mountain climbers find peaks with many challenges and fishermen catch cutthroat trout, rainbow trout and Dolly Varden in the park's many waterways. There is swimming in the summer and cross-country skiing in the winter. Two areas, Buttle Lake and Forbidden Plateau, have some development for visitors but most of the park is a remote and truly magnificent wilderness.

Access to the park from Port Alberni is by boat up Great Central Lake and then by trail along the northern side of Drinkwater Creek to Della Falls, a distance of 58 km. Access is also possible by logging roads.

Facilities	Activities	Markets
Campsites (161)	Camping	Outdoor enthusiasts
Picnic areas	Picnicking	Naturalists
Hiking trails	Hiking	Photographers
Cross-country ski trails	Cross-country skiing	Skiers
Ski hill	Downhill skiing	Fishermen
Boat launching	Mountain climbing	
	Fishing	
	Nature interpretation	
	Swimming	
	Photography	

3.2.1.2.5 Taylor Arm

Located near Sproat Lake and just off Highway 4 northwest of Port Alberni, these two campsites are intended for group camping and are available by reservation. The park is pleasantly wooded with an undeveloped beach and is the only group camping area in the region.

Facilities	Activities	Markets
Campsites	Camping	Group camping

3.2.1.3 Forest Service Parks

3.2.1.3.1 Toquart Bay

This relatively primitive campground is located on Toquart Bay, near the head of Barkley Sound. It is about 15 km from Highway 4 and about 40 km from Ucluelet. The campground sits on a broad, sandy area on the shores of Barkley sound. It is an open area with little privacy but does afford good views to those camped along the water. The only facilities are a concrete boat launching ramp, a couple of outhouses and a few signs. The old mine workings are also an attraction.

Toquart Bay is a staging area for sport fishermen and recreational boaters using Barkley Sound and the Broken Group Islands.

Facilities	Activities	Markets
Unorganized campsites	Fishing	Fishermen
Boat launching ramp	Canoeing	Recreational boaters
	Kayaking	Canoeists & kayakers

3.2.1.4 Regional Parks

3.2.1.4.1 Mount Arrowsmith

This mountain recreation area is 23 km from Highway 4 and is just east of Port Alberni.

Donated to the Regional District of Alberni-Clayoquot by MacMillan Bloedel, the 1274 acre (464 ha) park provides hiking trails in alpine terrain, picnic areas and a ski development offering both downhill and cross-country skiing.

The road to the mountain provides broad, expansive views of the City of Port Alberni, Sproat Lake, Great Central lake, Barkley Sound and the forested slopes of the Vancouver Island ranges as well as the Strait of Georgia and the mountains of the mainland.

Facilities	Activities	Markets
Ski area with:	Skiing (downhill and	Local skiers
1 chair lift	cross-country)	Hikers
2 rope tows	Hiking	
2 T-bars	Picnicking	
Lodge & ski shop		
Ski rentals		
Ski lessons		
Cafeteria		
Lounge		
Hiking trails		
Picnicking		

3.2.1.5 Municipal Parks

There are numerous municipal parks in Port Alberni and a few in Tofino, Ucluelet and Bamfield. Most of them are relatively small in size and intended for use by local residents. The parks are frequently used for outdoor activities during festivals and special events. Only Dry Creek Campground is used regularly by tourists.

3.2.1.6 China Creek Park and Marina

This park and marina on Alberni Inlet, about 20 minutes south of Port Alberni, is managed by the Port Alberni Harbour Commission. Half the campsites are in the forest with most of them being open gravel parking lots although there are a few individual sites scattered among the trees. The other half are located along the shoreline and although they are exposed to the wind blowing down the Inlet, they have excellent views.

Some picnic tables and shelters are located near the campsites scattered among the trees. The area is used primarily by boaters and is jammed to capacity during the salmon runs of August and September.

Facilities	Activities	Markets
Campsites (205)	Fishing	Sport fishermen
Hiking trails	Boat charters	Boaters
Picnic tables and shelters	Camping	
	Picnicking	

Marina that provides:
- 197 berths
- day berths
- boat rentals
- boat launching ramp
- coffee shop
- gocery store
- fishing tackle
- bait
- ice
- gas, diesel and mixed fuel
- professional guides
- washrooms
- showers

3.2.2 Parks: Analysis

Several park related issues became apparent as a result of visiting the parks and our discussions with park personnel[1]. They are listed in order of their importance.

- lack of quality campground accommodation in the Tofino-Ucluelet area
  - . commercial campgrounds near the park are the source of complaints rather than developing user satisfaction with the area. The private sector does not seem able to provide profitable camping facilities of reasonable standard.
  - . there is adequate land within the National Park but it is back from the beach.
  - . the 1973 Provisional Master Plan and 1980 Management Plan specifies no additional development for the park, however, this may be overruled.
  - . some of the private campgrounds could convert to other more viable uses (e.g. Destination Resort) as the infrastructure improvements occur in the area north of the Long Beach Unit.
  - . Parks Canada provides campgrounds which greatly facilitates its ability to reach people with its natural resource and conservation messages.
  - . accommodations are scarce in the summer and the good ones are booked months in advance.

- the lack of control of access to Pacific Rim National Park
  - . there will be road access within a short distance of the West Coast Trail as logging activities open up roads in the area.
  - . there are numerous access points to all three units of the park
  - . multiple accesses make it very dificult to manage use of the Park.

[1]See Appendix 1 for list of contacted officials.

- lack of provision for group activities
  - Taylor Arm campground on Sproat Lake is the only group camping area in the region.
  - there are few provisions for buses in the park.
  - large groups destroy the quality of a wilderness experience for others in the area.
  - Parks Canada is attempting to manage the problem by asking for voluntary dispersion of large groups but with no control over access and no legal right to enforce regulations they cannot do much.

- the unofficial status of Pacific Rim National Park
  - park staff cannot enforce park regulations until the park is legally declared.

- improvement to campground at Toquart Bay
  - the Toquart Bay area is currently managed by the B.C. Forest Service.
  - the B.C. Parks Branch has the area under study and a draft report has been prepared.
  - Forest Service staff have commented on this draft report and would like to see something done there.
  - the Forest Service provides small, primitive recreation facilities in more remote areas and is not set up to manage large facilities.

- lack of campground facilities near Bamfield
  - the Parks Branch feels that there is no suitable land in an area that has enough atmosphere to make it a decent park.
  - major problems exist in Bamfield because of parking on the streets.
  - Bamfield is a jumping-off point for:
    - fishing in Barkley Sound
    - visiting the Broken Group
    - hiking the West Coast Trail
  - fishing activity is putting increasing pressure on the limited accommodations around Bamfield, especially during the peak fishing months of August and September.

- <u>carrying capacity of the Broken Group Islands</u>
  - . there are conflicts between people wanting a semi-wilderness water experience and other boaters in the area.
  - . the numerous accesses to the area make it impossible to control the numbers of users.
  - . fresh water supplies are a problem.

4.0 LAND/SEASCAPE UNITS

Since natural phenomena (rather than urban, industrial, historic features, etc.) are the overriding tourism attributes of the region, it is important to understand their various dimensions and classify them into distinct land/seascape units. From these units will emerge the various theme attractions and consequently the services that support them.
The units are:

Unit 1. Sproat Lake/Kennedy Lake Corridor
Unit 2. Alberni Inlet
Unit 3. Barkley Sound
Unit 4. Tofino/Ucluelet Coastline
Unit 5. Clayoquot Sound
Unit 6. Great Central Lake/Stamp River
Unit 7. Mount Arrowsmith
Unit 8. West Coast Trail

The remaining landscape is largely mountainous terrain without much access, frequently logged and offering little or no potential for development opportunities.

Although each has its specific properties they are largely characterized by one of three themes.

- west coast coastline where expansive sand beaches and rugged rocky forms abruptly interface with verdant rain forest walls providing both attraction and servicing land base.
- saltwater protected sounds textured throughout by islands of varying sizes which offer protection and refuge from the Pacific forces, and access to natural attractions and camping areas.
- freshwater lakes/rivers offering pleasant relief and contrast from the dramatic forces and land/sea forms that shape the other units.

Mt. Arrowsmith as well as being outside the region offers a separate mountain experience and snow-based activities.

The Land/seascape units are:

4.1 SPROAT LAKE/KENNEDY LAKE CORRIDOR

This unit provides three major functions:

- permanent and some vacation residences and associated activities such as boating, fishing, swimming and water-skiing.
- access across the region via an attractive and dramatic road corridor.
- fresh water bathing and boating adjacent to the Coastline limit.

Sproat Lake is largely used by Port Alberni residents and fellow islanders from Nanaimo, Parksville/Qualicum Beach. It is the only one of the three lakes that support development, partially because of its proximity to Port Alberni and Route 4. Its calm waters have also been used for the B.C. Water Ski Championships.

The Sproat Lake area will probably not experience a major increase in visitation over the next few years because it faces strong competition from the attractions of the coast. Nevertheless it may play an expanding role to those tourists travelling along Route 4.

Route 4 provides a dramatic and engaging entrance/access to the resources of the Tofino/Ucluelet Coastline. Rest areas along the route adjacent to Kennedy River offer pleasant visual relief and contrasting pace from the activity of driving through this rugged river corridor.

Kennedy Lake is one of the three large lakes in this region and the largest on Vancouver Island. It offers particular benefits to the visitor because of its proximity to the National Park. Its warmer, fresh water beaches and calmer waters provide relief, contrast and variety to those visiting the coastal unit. The lake is accessible from Route 4 and there are a number of entrance points that can be used for Boat Launching. The northern part of the lake is accessible by logging roads and a limited water link to Tofino Inlet is possible via Kennedy River.

4.2 ALBERNI INLET

The "fjord-like" character of this 27 km long waterbody makes it a special attraction in the area. It offers an exciting entrance to the Barkley Sound Unit as well as the two coastline units. The unit is characterized by steep unapproachable slopes that only occasionally offer vehicular access and which are generally used by the forest industry. The Inlet is dotted with a few sites of interest along the route including China Creek, a fish hatchery, an old relic canning factory and occasional streams and inlets. The tourism value of Alberni Inlet is mainly in its overall scenic quality and fishing opportunities. The corridor is constantly active with both sports and commercial fishing vessels both seeking the same fish and consequently creating one of the principle resource conflicts in the region[1].

4.3 BARKLEY SOUND

This saltwater unit is one of the prime water-based destinations in the Region, especially for those travelling by or with boats. Despite its direct exposure to the Pacific Ocean its waters are generally protected by the hundreds of islands scattered across its surface. With the Broken Group at its center this waterbody is used for most types of boating activity including kayaking, sailing, motorboating, and canoeing. It has also proven to be a major attraction for those interested in the nature interpretation opportunities of the marine life of the west coast. Sea lions, grey whales and a variety of seabirds can readily be found in these waters creating opportunity for observation, interpretation and photography. Salmon fishing is undoubtedly the biggest activity with fishermen coming from throughout the Pacific Northwest to fish its rich waters. It is readily accessible from Alberni Inlet, Ucluelet, Bamfield and Toquart Bay. On a sunny day the unit presents a mosaic of inlets, coves, beaches, rocks and islands to the boater. Even when draped in drizzle or fog the mystical quality of this area provides challenge, contrast and remoteness not found in other land/seascape units.

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[1]Discussion with Commercial Fishermen (Bamfield, Ucluelet) and Department of Fisheries and Oceans

4.4 TOFINO/UCLUELET COASTLINE

The coastal beaches of Pacific Rim National Park are the main attractions of the Region. The thousands of tourists drawn to them each year are serviced at either end of this coastal corridor by the villages of Tofino and Ucluelet.

The National Park has an international reputation for its unique beauty and representation of the west coast, consequently it is the major generator of tourists to the area. It is supported beyond its boundaries by smaller yet nevertheless spectacular beaches (Chesterman, MacKenzie). The two villages at either end of the unit are significantly different from each other in visual character, services, size, role and lifestyle. While Tofino is perceived as a quaint, "typical" fishing village, tucked into the natural beauties of Clayoquot Sound, Ucluelet is by contrast an industrial, entrepreneurial and an active service centre and coastal town. Both receive many benefits from the presence of the National Park yet their tourism function on the coast is different. Most tourists are initially attracted to the pastoral setting of Tofino, but frequently find their services in Ucluelet which comparatively has more motel units and restaurant seats.

4.5 CLAYOQUOT SOUND

The Sound is not as popular with boaters as Barkley Sound yet its relatively safe, protected waters offer kilometers of pleasant boating amongst the many inlets, arms, sounds, bays and channels. Unlike Barkley Sound the islands are large and high, offering greater sense of enclosure in the more than 400 km of coastline. One of the highlights of the Sound is Hot Springs Marine Park.

4.6 GREAT CENTRAL LAKE/STAMP RIVER

This is one of the least frequented units of in the Region. Although it contains some interesting attractions, its inaccessibility and

inability to compete with other regional attractions make it less significant. Nevertheless, the unit does have potential. Della Falls, the tallest in North America, has recently been opened for easier access and potentially represents a new entrance to Strathcona Park. The Robertson Creek Fish Hatchery and the Stamp River Falls Park both can make more important contribution to the tourism strategy.

4.7 MT. ARROWSMITH

This unit including Mount Arrowsmith Regional Park offers some of the best mountain views on Vancouver Island and is an attraction in both the summer and winter seasons. Logging and the Ski Area Development have opened up spectacular views over the Alberni Valley. This area offers the only winter attraction opportunity for snow-oriented activities in the region. Its recent master plan calls for a major upgrading of the Ski Area.

4.8 WEST COAST TRAIL

As the unit title suggests, this facility offers a true taste of Canada's west coast to those interested in an outdoor recreation experience of hiking and primitive camping. Its popularity is increasing annually and visitors can camp and hike along its entire length. In the region, Bamfield receives most of the benefit from users of the trail.

4.9 COMPETITION FOR RESOURCES WITHIN UNITS

Within each land/seascape unit there is competition between the tourism industry and either the fishing or the forests industry. The future level of that competition will depend on the type of development proposed in each unit.

- Tourism and Forestry

The most significant implication of forestry on tourism is the negative visual impact of clearcutting. Although it may be argued that timber operations present a valuable interpretation opportunity, frequent studies by the U.S. Forest Service on viewer perception of clear cutting suggest it has a negative impact on the travellers' overall experience. In the region these views are most obvious from Route 4 and Long Beach. Port Alberni's image as a mill town, with its odour and plume, also has a negative impact on tourism opportunities.

Access to logging roads used to be a problem, however, that seems to have improved with proper signage in the past few years.

- Tourism and Commercial Fishing

The most obvious complaint from both sports fisherman and commercial fisherman is that both are taking too many saltwater fish. There are no available statistics but interviews with fisheries officers suggest that the sportsfishing catch is substantial. This is partly due to sports fisherman taking over their limit[2]. It would appear that for the next decade there will be enough resources for both and that sports fisherman will be limited by the shore based facilities rather than the number of fish resources.

There is also competition for moorage space especially in Ramfield and Tofino where there are no marinas. During the commercial fishing "opening" in particular, competition for space on the water is heightened. There appears to be no such conflict with fresh water fishing.

Figure 4 outlines existing areas of conflict within each land/seascape unit.

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[2]Conversations with Fisheries Officers - Port Alberni.

RESOURCE CONFLICTS BY LAND/SEASCAPE UNITS

	Sproat Kennedy Lake Unit	Alberni Inlet Unit	Barkley Sound Unit	Ucluelet/Tofino Coastline Unit	Clayoquot Sound Unit	Great Central Lake Unit	Mt. Arrowsmith Unit	West Coast Trail Unit
FORESTRY								
Visual								
- Road	●	0		●			●	
- Beach		●	●	●	0			0
- Water		●	●	0	0	0		
Odour	0	●						
Logging Roads	●	0				0	0	
FISHING								
Fish Resources		●	●		●			
Moorage Space		0	●	●	●			
Water Surface		●	●					
Shore facilities		0	0		0			

HIGH IMPACT ●
MODERATE IMPACT 0
NO IMPACT

FIGURE 4

5.0 HERITAGE RESOURCES

5.1 OVERVIEW

The heritage resources are not as numerous nor as well developed as the natural resources. As a matter of fact when compared to other tourist destination regions, Alberni-Clayoquot has done relatively little to exploit its historical and cultural base. There are several reasons why this development has not happened:

1) Development of the region is rather recent with the villages and city only growing over the past century. Settlers only began to arrive in Ucluelet during the early 1880's, for instance; and
2) The relatively low population has not expressed the need to establish a major historic attraction.

There are, however, many existing features and events that have potential as historic/cultural resources. They can be grouped into three categories:

- West Coast Native;
- European Exploration; and
- Fishing and Forestry Development.

5.2 WEST COAST NATIVE

The West Coast native culture is one of the best known in North America. It has been considered as one of the most sophisticated native societies (craft, material development, social structure), and also one of the largest. Reports of 20,000 people living in the Barkley Sound area at one time indicate that the bountiful marine environment could support tribal development that was more dynamic than the inland plains and forest dwellers.

These abundant resources are expressed in their many remaining artifacts - the great dugout canoes, petroglyphs, the decorated longhouses, and of course the internationally famous totem poles.

There is no major concentration of native artifacts in the region, however, the Port Alberni Museum has a small collection as well items from their whaling culture can be found in museums throughout the U.S. This once rich heritage is mostly exposed to the tourist through the sale of handicrafts and souvenirs, and although the quality of these items is extremely high, there is no opportunity to sense the lifestyle, philosophies and cultural values of the native people.

There are however sporadic sites throughout the region where signs of native activity exist such as:

- Sproat Lake
- Vargas Island
- Stubbs Island
- Various Islands in Barkley Sound.

5.3 EUROPEAN EXPLORATION

European exploration of the west coast began almost two centuries after the first Spanish/French exploration of Canada's east coast, making European contact rather recent. However, there were some significant events within the region - or close to it. Both Spanish and English presence were felt during the latter part of the 1700's spurred by an abundance of furs (sea otter) fish and timber. The following list of notable events suggest a diverse heritage with development opportunity.

1774 - First Spanish Exploration
1778 - Captain James Cook visits Nootka Sound
1791 - Construction of Fort Defiance by Robert Aray
1792 - Spanish Navigators, Galiano and Valdez name Tofino
1792 - Captain Gray burns 700 houses at the Opitsaht Indian Village.
1803 - Massacre and Burning of the Ship "Boston"
1890 - Settlers arrive at Ucluelet and Tofino and gold is found at Wreck Bay
1920 - Japanese fishermen start to settle in Clayoquot Sound and Barkley Sound.

Over 500 shipwrecks, skirmishes with the natives, rum running, construction of the west coast life saving trail, trading posts, sealing and fishing posts provide a heritage spectrum that deserves interpretation. This is only acknowledged in The West Coast Museum (Tofino) and The new Port Alberni Museum.

5.4 COASTAL FISHING AND FORESTRY INDUSTRIES

Much of this activity has only taken place within the past 75 years. Both the fishing and forestry industries have experienced progress and recession throughout this period. For example, during the 1920's six salteries and three canneries existed in the vicinity of Kildonen. The depression resulted in the closing of these canneries and salteries. Both of these industrial sectors have had a major impact on the development of the area.

6.0 INFRASTRUCTURE AND LAND USE

6.1 TRANSPORTATION

6.1.1 Roads

Most people come to the region by private car, recreational vehicle or rented car. The largest flow is along Route 4 between Port Alberni and Tofino/Ucluelet. The only other significant roadway is from Victoria via the Cowichan Valley. This is a gravel, winding road that is best done by sturdy vehicle and not particularly attractive to the automobilist. The Comox Road is used in the summer but would seem to provide[1] little access opportunities without upgrading.

6.1.1.1 Route 4

The highway although challenging and at times dangerous, provides an excellent access considering terrain conditions. There are already several unofficial rest areas along Kennedy River and Kennedy Lake which offer relief and sightseeing opportunities. These areas could be properly signed with additional interpretive signs. The portion of highway through the park has long straight stretches with only one significant dip at Sandhill Creek, which will be upgraded. The stretch of road between the Park and Tofino has many dips, hills and S curves which are also being upgraded.

Route 4 adequately serves the existing travellers.

6.1.1.2 Port Alberni - Bamfield Road

The road is gravel surface, frequently rough and continuously curvilinear and therefore limits access to Bamfield for a certain part of the market. This can be considered to be both positive and negative. Many people in Bamfield want to keep the existing road conditions in order to minimize tourist traffic.

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[1]No data are available, however, present road conditions do not encourage tourist traffic.

It is unlikely that the road will be significantly upgraded in the future.

6.1.1.3 Logging Roads

There are hundreds of miles of roads throughout the region most only accessible by four wheel drive vehicles. The main users are hunters and fishermen. Tourists may no longer obtain a copy of the logging route map and travelling on these roads is not encouraged by the forestry industry for security reasons.

6.1.1.4 Parking

Parking is not generally a problem in the region except for Bamfield where it presents the major tourism related issue.

Port Alberni	- ample parking throughout the city
	- adequate parking has been provided for Harbour front
Tofino	- more parking needed in the wharf areas
Ucluelet	- no apparent problems
Bamfield	- growth and development of a quality tourism product is directly linked to the ability to solve the parking problem along the streets

6.1.2 Signage

Information signage to the region and throughout the region is poor. There is no indication along the Island Highway of the beauties of this region, there is no sign announcing arrival at the Pacific Rim Destination Region and signage throughout the region is inadequate with respect to locations of:

- information centres
- attractions
- special events
- service areas

Port Alberni as the largest municipality has inadequate signage to announce its Tourist Information Centre (to be rectified in 1984) and to locate its various attractions such as Lady Rose, Echo Center Museum. Adequate signage will be crucial to the future Harbourfront Developments to successfully attract travellers from Route 4 and lead them to the attraction. The use of distinctive color coded symbols (restaurants, motel, attractions) will heighten the tourist perception of Port Alberni as a municipality that is responsive to the tourist flow through the city.

6.1.3 Tourist Circuits

There are no specific tourist circuits due to the limited number of roads offering significant attractions along the way and the fact that the coastline is the ultimate attraction. Coastal Adventures Bus Tours has established a land based component, by tying in with the Lady Rose, essentially along Route 4 with stops at Long Beach, Sproat Lake and the Robertson Creek Fish Hatchery. Mavrick Coachlines also runs from Vancouver to Port Alberni to Ucluelet with a return Ucluelet - Port Alberni on the Lady Rose.

Successful tour circuits should include both a land and water base using Barkley Sound, Alberni Inlet, Clayoquot Sound, etc. Small tourist circuits may be developed around Port Alberni and the Cowichan Lake Road may eventually be part of an island circuit including Victoria, Port Alberni, Nanaimo.

6.1.4 Airports

Two airports serve the region - Tofino and Port Alberni. A sea base exists at Tofino (Pacific Rim Airlines).

6.1.4.1 Tofino

Tofino is equipped with a beacon, offers radio station service for the region, and is capable of accepting private aircraft as well as

large commercial jets (e.g. 737) on its three runways. The airport is ideally situated in the heart of the destination (Pacific Rim National Park and coastline) area with easy access to any of the existing or proposed destination resorts.

Fly-in package tours for diving, fishing, adventure or solitude could make greater use of the facility. The first attempts at such packaging was made by the Canadian Princess who in collaboration with Air B.C. used Dash 7's out of Vancouver. Approximately 320 travelled by air to Tofino in 1982[2] (individually) and another 400 arrived by Air B.C.

Tofino also has a sea base which allows float plane access to Hot Springs Cove. Approximately 450 flew in 1983. This is also a base for Pacific Rim Airlines Scenic tours over Barkley Sound and up the North Coast.

6.1.4.2 Port Alberni

Port Alberni does not have an airport but flights to the city use the grass landing strip owned by MacMillan Bloedel. It is unusual for an urban area of 30,000 people to not to have a landing strip and by comparison Campbell River with 17,000 people has a 5000' (1524 m) asphalt strip owned by the City. There were more than 900[2] landings in Port Alberni in 1983 and Pacific Rim Airlines brought in 821 passengers on its scheduled run during the summer months. This represents a significant growth over 1981.

6.1.4.3 Airlines

Both airports are served by Pacific Rim Airlines which also flies float planes out of Tofino Harbour. They are mostly available for charters and sightseeing although a scheduled visit is now available between Tofino, Vancouver and Port Alberni, twice a day during the

[2]Interview with Pacific Rim Airlines

summer and once a day in winter. Westwind Aviation attempted to establish scheduled service in the summer of 1983 but went into receivership because of lack of volume and expensive equipment. Air B.C. in collaboration with the Canadian Princess has offered Dash 7 charters out of Vancouver.

6.1.4.4 Bus Routes

Orient Stage Lines has scheduled daily bus service between Port Alberni and Ucluelet and Tofino with connections by Pacific Coach Lines to Nanaimo.

Mavrick Coach Lines ran 11[3] package tours in 1983 (up from 4 in 1981) to Port Alberni with two days in Ucluelet and visits to Long Beach.

[3]Interview with Mavrick Coach Lines

6.2 WATER, SEWER AND POWER

6.2.1 Tofino, Ucluelet and Clayoquot Sound Waterworks District

The study area comprises the Village of Tofino, the Clayoquot Sound Water Works District (C.S.W.D.), and the Village of Ucluelet.

6.2.2 Water and Sewer

The following examines the proposed works, in terms of their capacity and location to service the projected users.

6.2.2.1 Tofino/Ucluelet and C.S.W.D.

The problems associated with the water and sewage facilities servicing the Pacific Rim communities have been identified for a considerable number of years. The difficulty has been funding of the required upgrading, and the communities have, until this year, been unable to obtain a financial commitment from senior governments to support the required works. The Federal Government has now undertaken to fund the required improvements to the value of $11 million.

The basic inadequacies of the water systems on the peninsula are a lack of adequate supply, discolouration and sedimentation at certain times of the year, and structural defects within the transmission and distribution system. The distribution system also has inadequate capacity.

These problems have been addressed by the consultants who reported on the feasibility of upgrading the water supply systems to Tofino, Ucluelet, and C.S.W.D.[4]

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[4]Clayoquot Sound Waterworks Districts, Water and Sewer Study, December, 1980.

Since the works to be constructed will be based on these feasibility reports, we have reviewed the population increases projected for the area for the study period (1981 - 2001) and examined how the reports have dealt with the question of the expected tourism impact.

The population projections for the area are based on a Canada Department of Regional Economic Expansion Study (DREE) dated 1979, entitled "A summary of Economic Development prospects in the Ucluelet, Tofino Area As They Relate to Potential Water Demand."

The projections considered a number of development scenarios which, in turn, produced a range of population estimates. The highest range of projections has been used for the 2001 design condition.

The projections were:

1. Tofino/C.S.W.D. (former)	1981	2001
Village	800	1,543
Unincorporated (C.S.W.D.)	260	626
Indian Reserves	92	216
TOTAL	1,152	2,385

2. Ucluelet	1981	2001
Village	1,795	3,419
Unincorporated	588	1,300
Indian Reserves	285	585
TOTAL	2,668	5,301

These estimates concur with those contained in Appendix B of the MISBD, Pacific Rim Infrastructure Development Report (1981) for the year 2001 projections. The figures for 1981 are less in the MISBD report, however, the differences are not significant in this particular case.

The reports for Tofino and Ucluelet make no specific mention of travel industry visitors in their analysis, except that the Ucluelet

report indicates that the DREE Study examined the future growth of the travel industry "to determine the number of employment opportunities that would be generated over the next twenty years, and thus the number of permanent and seasonal residents to be expected in the area in the year 2001". We have not been able to clearly identify in these reports the number of motel units projected for the Tofino and Ucluelet areas over the study period. However, in overall terms the projections for the existing Village of Tofino allow for almost a doubling of the 1981 population of 800 over the next 20 years.

For the Ucluelet area the projection also allows for the population to approximately double over the study period from its 1981 estimate of 2668.

For the C.S.W.D. area 125 motel units have been identified as being required in 1981 and 305 in 2001, 620 campground units in 1981 increasing to 750 in 2001. The DREE study and the 1980 Tourist Accommodation guide were used to assess the split between Tofino/ Ucluelet and the C.S.W.D. and between campsite and motel units in the CSWD report.

A 20% increase in campsites has been allowed for the Tofino/CSWD area over the study period.

The 1979 DREE study stated that the B.C. Water Rights Branch recommended the following peak (maximum) unit water demands:

Domestic and residential:		682 ml (150 Imperial gallons) per resident per day
Travel related:	(a)	227 ml (50 Imperial gallons) per inside visitor per day
	(b)	45.5 ml (10 Imperial gallons) per outside camper per day

The report on Tofino states that this community has used 773 ml (170 I. gallons) per capita per day for the maximum day based on actual 1979 data obtained from the area, whereas according to the Ucluelet report, this town has used 800 ml (176 I. gallons) per capita per day for the maximum day also based on its system data. The C.S.W.D. estimates are based on 682 ml (150 I. gallons) per capita per day (maximum/day) plus an allowance of 295 ml (65,000 I. gallons) per day for tourists. At 227 ml (50 I. gallons) per capita per day, this equates to 1300 visitors per day, or over 300,000 for a period of 8 months in the year. The unit water demand rates used in the reports are acceptable.

Since the population projections and the unit water demands are in keeping with those recommended by the previous forecasts, we have not reviewed the proposed water infrastructure plan for the area in terms of the total capacity provided. For sewage, the unit rates used in the previous studies are based on actual data for Tofino (92 g.p.c.d. plus an infiltration allowance of 750 gal/acre/day), the B.C. Health Act for C.S.W.D. (84 g.p.c.d. with apparently no allowance for infiltration) and City of Nanaimo standards for Ucluelet. The latter includes an allowance for infiltration. All the reports have allowed for similar peaking factors. Except for the C.S.W.D. report not including an infiltration allowance, these unit rates are generally acceptable.

The Close Creek area on Meares Island is currently being tested as a groundwater supply source for the Tofino/C.S.W.D. area. This will entail the supply main on the peninsula being extended northwards to connect to the Tofino system and southwards towards the Park boundary to serve the C.S.W.D. area. This would adequately service the Tofino/C.S.W.D. area with a trunk water supply.

The improvements to the Ucluelet system are essentially an upgrading of the supply to the system within the Village area. Any new tourist oriented facilities will therefore need to be located within these areas.

The proposed sewerage improvements in Tofino and Ucluelet are designed to upgrade the existing village systems by renovating the collection and disposal systems to reduce the number of ocean outfalls. The C.S.W.D. system allows for collection from just north of the Park boundary and for Chesterman Beach. Sewage will be pumped via a low pressure and gravity system to Tofino. The sewerage proposals appear to adequately cover the area with the most potential for future tourism development. If any areas between the Park and Ucluelet are to be developed, the system could be expanded by pumping to Ucluelet if and as required.

The sewer and water proposals for these three communities adequately allow for quantities of sewage and water projected for the future tourism growth and also include the areas most likely to be developed.

6.2.2.2 Bamfield

Bamfield has an adequate water supply to meet future tourist demands. The only major development for the area that could have a significant impact on effluent disposal is the proposed campground however it is proposed that it would have its own septic field.

6.2.3 Electricity

6.2.3.1 Tofino/Ucluelet

B.C. Hydro and Power Authority has a 69 kV main supply along Route 4 to a substation located at its intersection with the Peninsular Highway. From there 12 kV lines supply Tofino to the north and Ucluelet to the south.

B.C. Hydro has stated[5] that this system has adequate capacity for the anticipated growth of the area. The local emergency back up system will likewise be able to handle the growth.

[5]Interview with B.C. Hydro

6.2.3.2 Bamfield

Electricity is presently generated in Bamfield by 5 diesel generators at a cost that is approximately five times as high as normal charges for B.C. B.C. Hydro is actively considering an alternative source. This also seems to meet with the approval of local people. Given the natural resources (small lakes, elevation, wind, etc.) a small hydro generating project, using wind energy to return the water back to reservoir would seem to provide the required electricity at a constant level. Such a project would also prove to be an interesting tourist attraction.

6.3 LAND USE AND PLANNING POLICIES AND REGULATIONS

This sub-section discusses those land use policies and regulations directly related to the tourism industry and/or the development of tourist-oriented facilities and attractions. Other municipal and regional regulations and policies such as business licensing, garbage disposal and collection, etc. do affect the tourism industry but only indirectly.

In general, land use regulations throughout the region do anticipate and accommodate tourist development. This is particularly evident in the coastal region. No matter where tourism businesses locate, they are subject to the same rules as any other form of commerce. If current policies prove inadequate, outdated, or too onerous, steps must be taken to develop standards and policies designed to meet the needs of the business, the region and the local community.

The three levels of land use policy and control evident in the region are:

i) regional planning policies
ii) settlement and community plans and subdivisions
iii) zoning and by-laws.

The impact of each level on tourism businesses is described below.

6.3.1 Regional Planning Policies

Official Regional Plans throughout British Columbia were nullified by the Legislature in November 1983. The regional plan for Alberni-Clayoquot provided a broad general statement of land use policy and objectives for the entire Regional District and is still used for reference purposes. Policies related to the control of sprawled and ribbon development influenced the location of tourist facilities. These policies also tended to focus development in or near existing urban centres.

The regional plan also recognized the value of beaches and foreshores and other special areas in enhancing the attractiveness of the region. The plan made provision for the accommodation of seasonal residences in designated areas.

Transportation facilities, including roads, airports and ferries were an integral part of the regional plan and are of vital interest to the tourism industry.

Specifically, the regional plan required tourist accommodation to be located in or near highway-commercial areas, except for resorts and fishing camps in isolated areas. Hotels were encouraged to locate in established communities.

While regional planning no longer has any official status, many of its principles and policies remain valid and often have been reflected in settlement and community plans.

6.3.2 Settlement and Community Plans

There are eleven settlement and community plans in the region. These are a relatively detailed level of planning with a 5 to 10 year horizon, in unorganized and organized areas respectively.

6.3.2.1 Port Alberni Official Community Plan

Adopted in 1975 this plan does not specifically address the tourism industry. Mention is made of motel and campground development in commercial-highway oriented areas. The plan is presently under review. Policies related to tourism will be considered.

6.3.2.2 Ucluelet Community Plan

The original community plan for Ucluelet was adopted in 1972. An important objective at that time was to locate tourist-commercial

businesses in the area of the entrance to the village. This objective is retained in the 1981 review and rewrite of the plan. Ucluelet recognizes the need to guide and accommodate growth, but wishes to maintain the character of the area while so doing.

Specifically, tourist-commercial facilities are directed to the Sea Plane Base Road area, at the Village entrance, and in the Peninsula Road-Main Street area. The strategy is to provide a focus for tourism businesses.

6.3.2.3 Tofino Community Plan

The Village of Tofino became a District Municipality by letters patent issued in Tofino's first Community Plan adopted in 1975. The first draft of a review was published in September 1980 in response to several major changes in the area and specifically the marked increase in tourism related to the establishment of Pacific Rim National Park and improved road access from points east. The plan clearly aims at providing needed services for tourists while maintaining the harbour-oriented character of the original village. Tourist-commercial areas are to be located near the Village entrance, removed from residental areas. Strip development is discouraged.

6.3.2.4 North Long Beach Settlement Plan (draft)

The Tofino Official Community Plan is currently under review following the reorganization of the municipality to District Municipality status. The review incorporates the North Long Beach Avenue. A draft plan for North Long Beach (prepared in 1980) suggested tourist accommodation and low-density residential development as the predominant land uses in the future, subject to the provision of adequate sewage and water facilities. It has, as yet, no legal status.

6.3.2.5 South Long Beach Settlement Plan (draft)

Prepared in 1981, this draft plan makes little reference to tourism. The demand for tourism businesses in this area between Ucluelet and Pacific Rim National Park is uncertain, but provision is built-in to consider any proposals which may arise. Proposed policies call for a review of the plan before tourist-commercial development is allowed. It has no legal status.

6.3.2.6 Bamfield Settlement Plan

The current plan for this unique community was adopted in 1980. Improvements to the road from Port Alberni, and the establishment of the West Coast Life Saving Trail as part of the Pacific Rim National Park have generated concern for the ambient character and lifestyle of the area. This concern revolves primarily around large increases in tourism. Accordingly, Bamfield has an expressed policy of limiting tourist commercial development to essential services for fishermen and campers. Provision is made for vacation homes and additional retail outlets are anticipated as use of the National Park increases. At the time of printing, the Bamfield Settlement Plan was under review and in its final draft form.

6.3.2.7 Beaver Creek Settlement Plan (Reviewed January 1984, and adopted)

The plan for this rural-suburban area was adopted in 1980. It does not specifically deal with tourism. No uses of a regional nature are anticipated, and the plan restricts commercial uses to those serving the local neighbourhood. Tourist-trade businesses are therefore virtually precluded.

6.3.2.8 Cherry Creek Settlement Plan

The plan for Cherry Creek (Electoral Area "F") was adopted in 1982. The only direct reference to tourism relates to limiting the provision of visitor accommodation in order to reduce the number of access points on the major highways. Strip development is discouraged.

6.3.2.9 Sproat Lake Settlement Plan

Adopted in 1982, the plan for this rural area is concerned substantially with waterfront recreation, and to a limited but related extent, tourism. Direction is given for non-resident recreational use to the Taylor Arm area of the lake, and the policy is established that tourist-oriented development should be 5 km from residential areas to avoid conflict.

6.3.2.10 East Sproat Lake Settlement Plan

This draft plan, prepared in 1981, contains no direct reference to tourism. Public Information and Advisory Planning Commission meetings on the plan are scheduled for March 1984.

6.3.2.11 Beaufort Settlement Plan

This plan was adopted in June 1983.
There is no direct reference to tourism in this plan.

6.3.3 Zoning By-Laws

There are four zoning by-laws which control land use and development within the Regional District of Alberni-Clayoquot. The Regional District's Zoning By-Law covers all alienated lands in the region outside municipal boundaries. The municipalities of Port Alberni, Tofino, and Ucluelet each have their own zoning by-law.

6.3.3.1 Regional District of Alberni-Clayoquot Zoning By-Law 1971

This comprehensive by-law provides for and regulates tourism businesses in four specific zones and indirectly, in six other zones. Vacation homes, motels and hotels, campgrounds, and commercial recreation facilities, each have their own schedules in the by-law. Other tourist trade businesses can be accommodated in more generalized commercial districts and in the waterfront commercial zone.

Comprehensive developments involving a mix of related uses on one site could be handled through the application of a number of pertinent zones. The use of Development Permits is not provided for under the current legislation, however, there is no possible use of such a mechanism.

6.3.3.2 City of Port Alberni Zoning By-Law 1972

This by-law divides the city into 29 zones which are virtually identical to those used in the Regional District. Tourist businesses are accommodated under the same basic regulations and schedules utilized in unorganized parts of the region albeit under separate jurisdictions. There is no provision for Development Permits. This matter is under review pending completion of the Tsunami Study.

6.3.3.3 District of Tofino Zoning By-Law 1975

The current zoning by-law was passed in 1975 and contains the same basic zones used in the surrounding Regional District. Tourist oriented developments are, therefore, adequately accommodated. Tofino does have provision for Development Permits but not Development Cost Charges. Apparently these provisions have never been used.

The recent reorganization of the area resulted in there being two zoning by-laws in effect within the municipality. This situation will remain until municipal council decides to consolidate the regulations into one by-law.

6.3.3.4 Village of Ucluelet Zoning By-Law

This by-law is also consistent with those of Tofino and of the Regional District. Ucluelet, however, has provision for requiring Development Permits.

6.3.3.5 Subdivision By-Law

The three municipalities each have their own by-laws to regulate the subdivision of land. These regulations deal primarily with the legal, technical and servicing aspects of subdivision. While not directly aimed at tourist facilities, any tourist-oriented development requiring the subdivision or consolidation of existing parcels of land would be bound by the applicable by-law.

The Regional District does not have its own subdivision by-law. The Ministry of Transportation and Highways is the approving authority and the regulations of the Local Services Act apply. Subdivision applications in unorganized territory are referred to the Regional District for review and comment.

6.3.4 Other Land Use Regulations and Policies

In addition to regional and municipal land use controls and policies there are several Provincial and Federal agencies whose requirements may affect the development of tourism businesses. Among these are the Provincial Ministry of Environment, the Ministry of Lands, Parks and Housing, and the Ministry of Transportation and Highways.

At the Federal level, the Department of Fisheries and Oceans, the Canadian Coast Guard and Transport Canada become involved.

The issues of concern to these agencies include everything from airports to tourism hazards. The use and development of marine foreshores, lowlands and estuaries are of particular interest.

A Barkley Sound Settlement Plan was being prepared during this study process.

TABLE 1

SUMMARY OF EXISTING LAND USE REGULATIONS

OFFICIAL COMMUNITY AND SETTLEMENT PLANS

NAME	IN PREPARATION	UNDER REVIEW	DATE OF ADOPTION	COMMENTS
City of Port Alberni		X	1975	weak on tourism
District of Tofino		X	1975	incorporates North Long Beach draft plan. Supportive on tourism
Village of Ucluelet		X	1972	supportive of tourism
Bamfield		X	1980	in final draft
Cherry Creek			1982	restrictive to tourism
Sproat Lake			1982	relates tourism to waterfront recreation
Beaver Creek			1984	precludes tourist businesses
Long Beach South	X			draft plan prepared in 1981 cautions on tourism
Beaufort			1983	no reference to tourism
East Sproat Lake	X			public meetings March 1984
ZONING BY-LAWS				
Port Alberni		X	1972	adequate provision for tourist businesses. No development permits
Tofino			1975	adequate provision for tourist businesses. Development permits available
Ucluelet			1973	adequate provision for tourist businesses. No development permits.
Regional District		X	1971	adequate provision for tourist businesses. Development permits being considered.
SUBDIVISION BY-LAWS				
Port Alberni			1974	
Tofino		X	1976	applies to new district municipality by letters patent
Ucluelet			1978	
Regional District			1978	no by-law. Local services act applies

7.0 TOURISM RESOURCES

7.1 INTRODUCTION

Tourism resources may be the main reason why tourists visit a particular area (e.g. Disneyworld) or they may be only services and other opportunities that have emerged because of a particular natural or cultural resource. The central reason for visiting Alberni-Clayoquot is to experience the natural resources and while sub themes do attract certain visitors, some of which are positive ("to meet the people"), some negative ("to have a cheap vacation") it is the beaches, the fishing and the semi-wilderness environment, etc. that provide the market opportunities (refer to Figure 5). The dedication of Pacific Rim National Park has strengthened that image because of its presence and its promotion. Yet a remarkably small tourism plant has emerged over the past ten years. The reasons are as follows:

- relatively low tourist flow and most of it is concentrated in the summer season;
- particular lack of interest in tourism in three of the four municipalities (i.e. Tofino, Bamfield and Port Alberni);
- lack of significant investment capital from within the region;
- human energies generally spent in other industry sectors such as forestry and fishing;
- only recent awareness that tourism is a viable economic force in the region's economy. The milestone may have been the Day of Discovery;
- general lack of organization of tourism and the accompanying strategies that follow including communication amongst the various components.

Nevertheless it can safely be said that the basic needs of the tourist are met despite a lack of accommodation on certain days in summer.

The tourist only spends approximately $20/day person which reflects the lack of opportunities to spend money on recreation and attraction.

The following text will outline those facilities/activities that do exist and comment on their ability to meet the requirements of the existing clientele. A comprehensive reference table is provided in the Appendix II listing all the tourism facility and special events.

In order to relate the overall development concept to the natural resource base, the inventory/analysis of the tourism resources will first be grouped under land/seascape units and categorized by municipality or "major development nodes"[1].

Focussing on these nodes is important because it provides a document that is particularly relevent to the industry operators, citizens and politicians of those areas.

The inventory/analysis will be organized according to the following tourism component grouping.

1. Accommodation - roofed
   - campground
2. Food/Beverage Services
3. Information Services
4. Attractions
5. Recreation Facilities
6. Events/Festivals
7. Retail Services

The following inventory/analysis outlines those facilities.[2]

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[1]Alberni Clayoquot Regional Tourism Strategy. Terms of Reference 3.2.2.
[2]For a more detailed review, refer to "Inventory of Travel Industry Facilities" compiled by Economic Development Commission. RDA-C., April 1982

Tourism Resource/ Market Opportunity Matrix

ALBERNI-CLAYOQUOT REGIONAL TOURISM STRATEGY

MARKET OPPORTUNITIES

- ● Strong market generator. Many people will travel for this purpose.
- ◐ Weak market generator. Some people will travel for this purpose, more will participate if available.
- ○ Poor market generator. Few people will travel more may participate if available.

RESOURCE OPPORTUNITIES

- ● Abundant resource opportunities both existing and potential.
- ◐ Moderate opportunities both existing and potential.
- ○ Severely limited or no opportunities available.

EXISTING MARKET PARTICIPATION LEVEL

- ● High levels of participation. Many people presently travel for this purpose.
- ◐ Moderate levels of participation. Appreciable numbers of people presently travel for this purpose.
- ○ Low levels of participation. Few people presently travel for this purpose.

TOURISM RECREATION OPPORTUNITY				MARKET SEGMENTS AND RESOURCE OPPORTUNITIES													
				International Market (Tertiary)			U.S.A. Market (Tertiary)			Inter-provincial Market (Tertiary)			Provincial/Pacific Northwest U.S.A. (Secondary)			Regional Market (Primary)		
				Market Opportunity	Existing Market	Resource Opportunity	Market Opportunity	Existing Market	Resource Opportunity	Market Opportunity	Existing Market	Resource Opportunity	Market Opportunity	Existing Market	Resource Opportunity	Market Opportunity	Existing Market	Resource Opportunity
NATURAL RESOURCES	Water-Based Recreation Opportunities	Boating	Saltwater Boating/Touring	●		●	●	○	●	●	○	●	●	●	●	●	●	●
			Freshwater Boating/Touring															
			Nature Interpretation		○		○	○	●	○	○	●	●	◐	●	●	●	●
			Salt Water Canoeing/Kayaking	○	○	●	○		●	○		●	●	●	●	●	●	●
		Fishing	Saltwater Sportfishing	○		●	○	○	●	●	○	●	●	●	●	●	●	●
			Freshwater Sportfishing															
		Swimming/Bathing											○	○	○	○	○	●
		Water Skiing											○	○	●	●	●	●
		Scuba Diving/Snorkeling					○	●	○	○	●	●	●	●	●		○	●
	Land-Based Recreation Opportunities	Skiing	Alpine													○	○	●
			Cross-Country													○	○	○
		Hunting	Big Game															○
			Small Game															○
			Water Fowl													○	○	○
		Camping	Motor Vehicle													○	○	○
			Primitive	○		●	○		●	○	○	●	○	○	●	●	●	●
		Hiking/ Backpacking	Day							○		●	○		●	○	○	●
			Overnight	○		●	○		○			●	○	○	●	●	○	●
			Winter							○			○	○	●	●		●
		Mountain Climbing		○		○										○		○
		Spelunking																
		Picnicking														○		○
		Cottaging											●	●	●	●	●	●
		Snowmobiling												◐	○	○		●
	Land and Water-Based Recreation Opportunities	Viewing Natural Landscape Features		○	○	●	○	○	●	●	●	●	●	●	●	●	●	●
		Wildlife Viewing														●	●	●
		Beachcombing		○	○	●	○	○	●	○	●	●	●	●	●	●	○	●
		Gathering/Collecting											●	●	●	●	●	●
		Photography/Painting											○	○	●	●	○	●
	Cultural Resource Opportunities	Natural Parks and Sites	National	○	○	●	○	○	●	●	●	●	●	●	●	●	●	●
			Provincial			○			○	○	○	●	○	○	●	●	●	●
			Marine			○			○	○	○	●	●	○	●	●	○	●
		Game Farms																
		Fish Hatchery								○		○	●	○	●	●	○	●
	Air-Based Recreation Opportunities	Sky Diving																
		Gliding																
		Recreational Aircraft																
	Historic Resource Opportunities	Historic Parks and Sites	National										○		○	○		○
			Provincial										○	○	○	○	○	○
		Museums	Local										○	○	○	○	○	○
			Provincial														○	○
			Regional														○	○
	Cultural Resource Opportunities	Population Centers	Municipalities						○	○	○	●	●	○	●	●	○	●
			Native Settlements							●		○	●		○	●	○	●
		Cultural Attractions	Fairs/Celebrations												○	○		○
			Crafts/Events											○	○		○	○
			Institutions												○	●	○	○
			Galleries/Museums/Art Centers												○			○
	Recreation/Leisure Developments	Recreation/Leisure Resorts Complexes	Coastal/Convention Resorts	○		○	○		○	●		●	●	○	●	●	○	●
			Hot Springs Attractions				○		○	○		○	○		●	●	○	●
			Sport-Wilderness Resorts										○		●	●		●
			Campground Resorts										○		●			●
			Cultural Resorts							○	○	○		●	●	●	●	●
			Theme Attractions	○		○	○		○	●		●	●		●	●		●
		Travel/Touring Corridors	Air							●		●	●		●			●
			Bus				○		○	●		●	○		●			○
			Boat							●		●	●		●	○		●
			Car				○	○	○	●	○	●	●	●	●	○	○	○
NON-DEVELOPMENT-CONTROLLED RESOURCES	Industrial Developments/ Attractions	Engineering Structures	Alternative Energy							○		○	○		●	○		●
			Wharves							○		○	○		●	○		●
		Industries	Fish Harvesting/Processing							●		●	○		●	○		●
			Timber Harvesting/Processing										○		●	○	○	●
			Deep Sea Shipping										○		●	○		○
			Mariculture							○		○	○		●	○		●

Source: The Vancouver Island Tourism Region - TIDSA

Figure 5

7.2 ALBERNI INLET LAND/SEASCAPE UNIT

The Alberni Inlet consists of two components:
- the City of Port Alberni;
- the inlet or canal stretching between Port Alberni and Barkley Sound.

7.2.1 Port Alberni

7.2.1.1 Overview

Concern for tourism and interests in its economic benefits is a relatively recent phenomena for Port Alberni. It has been stimulated by:
- the radically decreased role of the forestry sector and in particular the temporary closure of MacMillan Bloedel in 1982;
- the Day of Discovery discussions;
- the proposal to develop Harbourfront and Argyle Street and the expressed desire to improve the image of the City;
- the interest presently generated by a Regional Tourism Strategy; and
- the growing opportunity to promote the City as the Salmon Capital of the world.

While the boom years left little time to think of tourism they did provide the present tourism plant with a legacy of major facilities such as motel/hotel units (±500), a half dozen fine restaurants, an excellent museum and the Rollin Art Gallery. None of these facilities however have the capacity to draw people to Port Alberni and an expanded tourism base therefore would seem to require a major attraction, i.e. Harbourfront and its associated themes of port/industry activity, history, etc.

- General image

Port Alberni does not have an image, in the marketplace, as being a place to visit. For those who do know it their comments usually are frequently negative and concern:[3]

- smell of wood-processing mill town
- poor weather
- lack of hospitality

While the first two cannot be changed they are not insurmountable. Many tourists will cope with certain inconveniences if there are other qualities to the experience. Lack of hospitality has not been perceived as an issue in the region - including Port Alberni. While an industrial town going through rapid growth may not place a priority on tourists (as was the case in the late 70's), the community members may change their attitudes and projected image if they consider tourism as a viable economic alternative.

Of particular interest in "The Harbourfront Study" survey[4] notes was the total lack of perception of Port Alberni as a sport fishing center. In fact 7% of the tourists participate in saltwater fishing while in Port Alberni.

- Industry image

Despite any changes that take place through attraction development and marketing strategy, Port Alberni will maintain its "industrial" image - one that it should be proud of and continue to promote.

- Outdoor recreation image

Port Alberni has a second image which is oriented by its link and service role to the outdoor recreation opportunities of the surrounding region. In many cases it is necessary to pass through the

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3,4For further opinions refer to the survey done for the Report. "Port Alberni Harbourfront Feasibility and Design Study for a Tourist Attraction", TIDSA, Cumberland Group and Norm Hotson Architects.

City to visit these resources and almost always necessary to use the city as a local service centre. These surrounding outdoor recreation resources include:

1. Sproat Lake - cottaging, waterskiing, swimming, boating, Mars Bombers, camping
2. Great Central Lake - access to Della Falls, fishing, boating
3. Alberni Inlet - China Creek, fishing, boating
4. Mount Arrowsmith - hiking, skiing.

Port Alberni is at the hub of these four spokes which radiate in four directions.

- Staging area

All tourists going to Long Beach by either car or boat (Lady Rose) must pass through Port Alberni. It is therefore considered as a staging area and a primary service centre for the Alberni Clayoquot Region.

7.2.2 Tourism Facilities

7.2.2.1 Accommodation

Roofed

Port Alberni with ± 500 units dispersed among 15 hotels and motels has a very satisfactory accommodation sector and enough space to meet the demands for several years to come. In fact if the present quality of service and viability is to be maintained or improved it will certainly be necessary to increase tourist volume to the City during all seasons, especially in the winter. This can come about through:

- improved visitor perception of the City;
- increased appeal of package tours to Port Alberni, in combination with regional outdoor recreation resources;

- increased marketing at the municipal/regional level;
- added attractions to hold visitors over a longer period.

While there are a number of accommodation facilities that require upgrading their present visitation levels do not generate enough capital.

Pricing structure is favourable and extremely competitive with other regions of the island. Five businesses are capable of having conferences/banquets, three have pools and two have saunas.

Camping

The Dry Creek campground is a small park located at the tip of a wooded ravine about 5 minutes walk from downtown Port Alberni. There are 30 campsites (plus 19 spaces) with washrooms, showers and a resident caretaker as well as hiking trails, picnic tables, horseshoe pitches and a playing field.

The campground is currently operated at a loss by the City of Port Alberni on the assumption that there are other economic spinoffs, by people shopping downtown. While some campgrounds make money it is usually because of the concessions. KOA, for instance, loses money on its campsites but makes profits on restaurants, small bars, video games, etc. Campgrounds are services, not attractions and do very little to draw people to an area[5]. Nevertheless some municipalities have accepted to pay the price of providing for camping travellers. Merrit B.C., for example, has recently constructed 40 sites at a cost of $175,000[6], with 70% of the capital subsidized by TIDSA and Federal Work Programs. A reasonably high occupancy rate is expected because there is no other service for 20 miles. The only other known

[5]Survey conducted by City of Port Alberni.
[6]Discussions with City administrator.

municipality that is constructing campsites is the Town of Masset (22 RV sites) which is responding to high demand and it also received TIDSA support ($75,000).

Port Alberni is now faced with two alternatives:

- maintain the existing level of service with 49 sites at Dry Creek and accept turning people away between 3-5 weekends per year.
- accept paying upwards of $250,000 for a new 50-60 unit campground.

The second scenerio could be realized with Federal Grants, thus reducing capital costs and if proper concessions were added, the enterprise may interest a private operator.

Bed and Breakfast

There are at least one dozen bed and breakfast facilities throughout the city yet they are difficult to find because of lack of identification.

7.2.2.2 Food Services

Restaurants

There are approximately 40 food outlets in the city with quality and eating experience varying from the typical fast food outlet to sophisticated dining at restaurants such as the Little Villa or Galaxy. While none of them offers a memorable dining experience their quality has established a standard that will meet the market demands for the immediate and short term[7].

Food Stores

The more than 30 food stores offer a complete variety of food products including delicatessen and natural foods.

[7]Discussions with Restaurant Owners.

Markets

While a fish market and farmers market presently function at either end of the city, the proposed Harbourfront market should successfully group a large variety of products. Retail food sales is important to support the tourists perception of Port Alberni as a staging area and primary regional service centre.

7.2.2.3 Information Services

Tourist Information Centre

Port Alberni has the most significant Tourist Information Centre in the entire region and one of the most attractive on Vancouver Island. The building is spacious and functional. Unfortunately access presents a major problem that can only be overcome by directional signage. This may require special agreement with the Department of Transportation and Highways. Information is provided on the entire region and staff are knowledgeable about the available resources in both Port Alberni and the coastal areas.

Signage

Signage from the Information Center to the attractions of Port Alberni are equally difficult to trace and the Harbourfront development will require major indications if it hopes to attract visitors off Route 4.

Pamphlets

While Port Alberni is the only municipality or attraction to have a pamphlet available on the mainland (e.g. Robson Square Information Center) relatively little is known about the city and region. No information existed in the B.C. Tourism Seattle office.

Nevertheless ample data exists on the B.C. Ferries and although it is effective for those coming to the region it may be a bit late to persuade the movement of traffic away from their north or south Vancouver Island destinations. The only constant source of promotional literature that exists on the region is produced by Parks Canada and this is distributed across the country.

7.2.2.4 Attractions

Port Alberni has just five tourist attractions. Only the Lady Rose and fishing charters have a significant impact on tourism to the City. The other attractions of more limited value are:
- the Museum/Echo Centre
- the Rollin Art Gallery
- the mill tours.

The Lady Rose

This coastal supply boat offers one of the best man-made attractions in the region and is one of the most important attractions to Port Alberni because of its ability to ensure:
- a quality tourism attraction
- at least two nights accommodation in Port Alberni.

The prices are excellent, the experience is one of the most interesting on the Island, offering an engaging mixture of history, scenic beauty and education. Its present tie-in with the Coastal Adventures Bus Tour provides an important regional package. The development of Harbourfront will support the overall intent of this attraction.

The vessel contributes to Port Alberni's role as a staging area for the region. Providing transit to both Ucluelet and Bamfield it is a major link, via Alberni Inlet to the coastal zone. Increased visitation to the region will place new demands on this vessel, necessitating additional and faster equipment. The present increase in traffic can be attributed to a recent advertising campaign.

The Echo Museum

The presentation of artifacts and opportunity for hands-on experiences makes this museum one of the finest on Vancouver Island. Contemporary display techniques, attractive architecture and knowledgeable staff assure that this facility will contribute to length of stay of those visitors who know about it.

The museum does not presently constitute a significant attraction that draws people to the City. Although tourist attendance will undoubtedly grow, it only serves as a part of the overall attraction component mix for Port Alberni.

- The Rollin Art Gallery and Craft Outlet

  Again this is another quality exposition that clearly represents the fine craft of the region. Its location is appropriate and could be linked with any development of Harbourfront and Argyle Street.

- Harbourfront Development (under construction)

  Although only in the construction stage this project has all the potential to provide Port Alberni with the attraction it absolutely needs. It must be noted however, that based on the facilities planned in this first phase, it does <u>not</u> constitute a visitor attraction. Phase I includes:

  - the market area
  - the snack bar
  - the Lady Rose facility
  - the infrastructure/landscaping
  - the washrooms, etc.

  The final success of Harbourfront will lie in the projects ability to project a strong visitor attraction image based on the mix of the proposed attraction components including:

- restoration of the Heritage Sawmill
- construction of the Santiago
- use of Two-Spot as a train ride and locating it at the existing railway station

While this background document supports the mix outlined in the Harbourfront Feasibility Study[8] the proliferation of numerous mini attractions over a large site presents difficult image problems when marketing the facility. The forest industry is probably the most significant overall theme and as each component attraction is added to the development, it should be integrated into the "wood processing" theme.

Recent bids on capital construction have proven to be low. Maximum effort should be made to take advantage of this situation and speed the Harbourfront to completion and promote it as a major theme for visitor attraction to Port Alberni and the area.

Phase I of the Harbourfront does not yield the level of attraction necessary to pull people off Route 4 or bring them to Port Alberni from beyond the region (ie. Parksville/Qualicum Beach). This is not to say that the present building program will not be effective, it should, only be considered as the base to which the real attractions will have to be added.

Attractions proposed by the planners of the Harbourfront Development have the potential to provide the type that is needed. They include:

- The Two Spot locomotive
  This project seems close to realization. Its proposed trip along the port facilities have many of the ingredients of a strong attraction - movement, participation, education, history and entertainment.

8"Port Alberni Harbourfront Feasibility and Design Study for a Tourist Attraction", Cumberland Group and Norm Hotson Architect, 1981.

- The sawmill relocation/construction
  This attraction relates to the industrial heritage and forestry themes of the Port Alberni image. Work is underway however dates and funding are unsure.

- The Spanish Galleon - "Santiago"
  While not in keeping with the industrial theme it nevertheless reminds us that the early Europeans (Spanish/English) were sailing these waters and shores in search of its natural resources.
  The Spanish theme is also pertinent because it:
  - has mystique and charm
  - has not been developed in B.C.
  - appeals to the expanding European tourist market.

- The "Granville Market"
  While the concept of boutiques, markets, craft outlets, etc. is very appealing, its success will depend on larger volumes of tourists. The project needs a stronger draw. The proposals seem so close to being developed that the extra energy necessary to see them built must unquestionably be spent immediately after completion of this phase.

When the final phase of the Harbourfront project is complete Port Alberni will have a visitor attraction that will:
- increase tourist volume to the city
- increase average length of stay
- provides a strong symbol for the citizens of Port Alberni
- extends the length of the tourist season
- assists the motel/hotel/restaurant operators
- provides a comprehensive staging and service area for the entire region

Other attractions that are presently available in Port Alberni include:
- Mill tours
  Industrial tours are becoming increasingly available to the

travelling public who find educational and entertainment value watching raw material turned into lumber. Tours of the Alberni Pulp and Paper Mill and the Pacific Sawmill Co. should be further promoted with additional advertising, literature on the forest industry and perhaps some participative experience.

- Commercial Fishing wharf
  When the complete fishing fleet is docked it is an impressive sight. This does not occur on a continuing basis and therefore is not a constant attraction. The glass enclosed fireboat is a creative addition to the wharf activities.

- Fishing/diving charters
  There are at least nine charter operations in Port Alberni offering salmon fishing, diving, etc. They are frequently associated with a hotel or marine-based retail service.

7.2.2.5 Recreation Facilities

- Marinas

The two marinas, Clutesi Haven and China Creek represent close to 400 berths; yet they are frequently full. A third facility (Hunters Marina) has just opened. The present demand seems to indicate an opportunity for even more berths.

- Golf Courses

The two golf courses (9 holes) adequately respond to the present demand in terms of size and quality.

- Other Facilities such as the Echo 67 Centre, and the Aquatic Centre are rarely used by the mass traveller. They may be used however by special interest groups.

7.2.2.6 Festivals and Special Events

Considering the population size of Port Alberni there are a remarkable number of festivals and special events going on each year that attest to:

- the level of community spirit;
- the diversity of interest of the citizens;
- the organizational ability and strength of the volunteers.

The dozen events that occur each year play a minor role at this point in attracting tourists and increasing their length of stay. However, the out of town participants make use of hotels, especially in the shoulder season. For instance, the Dog Show has more than 1,000 participants many of whom stay in local motels with their families. Although no definitive data are available on the exact economic impact of these events it is understood that they:

- generate extra dollars in accommodation, retail and food service;
- encourage repeat visitation to the City;
- often attract visitors in the shoulder season, ie. Loggers Sports Day, Alberni District Fall Fair, Octoberfest.
- praise the local hospitality when returning back to their home town.

The Salmon Festival is particularly effective for attracting tourists from outside the region. As well, the recent Native Summer Games received excellent publicity throughout the province.

7.2.2.7 Retail Services

Port Alberni has a full range of gasoline outlets and retail stores ready to meet all the needs of the present tourist shopping demands. Quality local crafts are available at several stores.

7.3 ALBERNI INLET
SPROAT LAKE/KENNEDY RIVER CORRIDOR UNIT
GREAT CENTRAL LAKE/STAMP RIVER UNIT
MOUNT ARROWSMITH UNIT

7.3.1 Overview

These four land/seascape units exist on the perimeter of Port Alberni and greatly contribute to the City's base and vocation as a tourist service centre and staging area. The specific resources within the units are:

- Sproat Lake
- Kennedy River Corridor
- Great Central Lake/Stamp River and Della Falls
- Alberni Inlet
- Mount Arrowsmith Regional Park and Ski

These four units have been grouped together because collectively they contribute to potential development of Port Alberni. As such they must be developed collaboratively with the City. For the purpose of this inventory all their resources have been grouped together.

7.3.1.1 Accommodation

Roofed

Only four facilities exist (West Bay, Maples, Fish'n Duck, Ark Resort), three at Sproat Lake and one at Great Central Lake. The West Bay Motel satisfies the needs of Sproat Lake while the Ark Resort has the potential through upgrading to become an active staging area to Della Falls and Strathcona Park as well as an attractive retreat.

Campground

Campgrounds exist at Sproat lake (1 provincial, 2 private) and at the Stamp Falls Provincial Park.

There seems to be opportunity for growth of campsites - especially at the Sproat Lake Provincial Park. This would generate extra activity around the lake and support commercial attraction development such as a mini water theme park.

7.3.1.2 Food Services

There are three restaurants and a grocery store/marina on Sproat Lake.

7.3.1.3 Information Services

There are no "official" sources of information.

7.3.1.4 Attractions

There are several small yet unique attractions throughout the area:

- The Mars Water Bombers (Sproat Lake)
  Unfortunately they do not give enough demonstrations.
- The Robertson Creek Hatchery
  A fascinating and dynamic attraction providing visual contact with the fish that makes this region famous as well as winter steelhead fishing and camping
- Della Falls
  As the highest falls in North America there is great marketing value to be placed on this feature. As well, recent work by the R.D.A-C has made the site entirely accessible and in fact spectacular when combined with a boat ride down Great Central Lake. The eventual completion of a trail system around the falls will make this one of the best hiking opportunities on the Island and one that is easily sold in Europe and the U.S.A. The Great Central Lake/Della Falls link also means a new entrance to Strathcona Park via the Alberni-Clayoquot Regional District.
- Stamp Falls
- Alberni Inlet
  As a fishing area and as one of the most beautiful fjords in western Canada this 27 km inlet appeals to fishermen, boaters,

photographers as well as those estimated 12,000[9] who take the Lady Rose each year. While the steep slopes on either side of this corridor protect its natural beauty it also makes it rather inaccessible. Existing boat ramps at China Creek, and boat access from Port Alberni respond to the existing demand. Historic sites of interest occasionally dot the shoreline and remains of Canneries from another era can still be seen. There would seem to be opportunity for additional boat cruises on this waterway with destinations such as the Broken Group, Bamfield, Ucluelet. However faster boats than the Lady Rose should also be used.

7.3.1.5 Recreation Facilities

Few recreation facilities exist outside Port Alberni other than:
- 3 marinas and boat ramps;
- Sproat Lake Community Centre;
- Mount Arrowsmith Ski Area Facilities.

Mt. Arrowsmith Ski Area is the only opportunity in the region to develop snow based winter recreation/tourism. The facility has been in operation since 1974 and in 1978 construction was started to build T-Bars in the Alpine areas.

The most recent plan, developed by Ecosign, recommends the relocation of the major development area from the Arrowsmith Base to the Arrowsmith Alpine. This move is recommended for two reasons:
- to take advantage of better conditions at the higher elevations and produce a longer season;
- to provide access to longer, steeper runs which would attract more experienced skiers.

These developments will increase visitation to the facility but new growth will be largely local. While new facilities will improve skiing opportunities there is a number of factors that will prevent

[9]Interview with Owners

Mt. Arrowsmith from becoming a significant regional ski facility. For instance:

- the access under most conditions is difficult, long and is best done with a four wheel drive vehicle;
- snow pack is inconsistent;
- there are better slope conditions at Mount Washington and Forbidden Plateau;
- to make a major, competitive regional ski facility it is necessary to spend a significant amount of money.

While Mt. Arrowsmith will play an expanding role in the overall ski scenario for the central island, its growth will probably be slow and slightly more conservative than the moderate estimates proposed in the master plan. It may nevertheless be a part of a package offered to Port Alberni but only when combined with other activities in the city and area.

7.3.1.6 Festivals and Special Events

The B.C. and Western Canada Water Ski Championships were held on Sproat Lake and there is the annual Loggers Sports Day.

7.3.1.7 Retail Services

They are all located in Port Alberni except for Fish'n Duck.

7.4 UCLUELET/TOFINO COASTLINE UNIT

7.4.1 Tofino

7.4.1.1 Overview

This community now totals 1,006 as it has recently been restructured to include the former district of Long Beach. It is located on the northern tip of the Esowista Peninsula, is considered as a "typical westcoast fishing village" and extends to the National Park Boundary. Despite the growth and "progress" that have taken place in many coastal towns throughout B.C. Tofino has managed to protect its charm. That quality has now become its greatest asset from a tourism point of view. Tofino is the type of community tourists love to visit; it has character, personality and setting.

(a) Character includes:
- relatively attractive streets, trees and a central park
- charming architecture ie. Anglican Church
- accessible wharves with their various activities (charters, fish market, processing plants, sea plane base)
- a physical layout that provides a sense of cohision and easy access to most of the services

(b) Personality as it is reflected in the people:
- hospitable
- determined to maintain quality of life
- appreciative of their natural resources
- expressive of a sense of place and commitment.

(c) Setting
- has maintained a complete integration with the natural surroundings;
- is visually a part of Clayoquot Sound as much as the Esowista Peninsula;

- focus is on the inlet and fishing activities with Meares Island, Stubbs Island as a backdrop.
- sense of visual containment created by the islands in Clayoquot Sound.

Tofino also has an image amongst many Canadians. For various reasons it has been exposed through the national media and is considered as a town that typifies west coast living. It is also perceived by many visitors to be the end of the road - the ultimate destination ("you just cannot go any further!"); or the beginning of the road if considered mile 0 of the Trans-Canada Highway.

Tofino contrasts remarkably with Ucluelet - possibly for the mutual benefit of each in terms of tourism opportunities. While Tofino is passive, indeed cautious, concerning change, Ucluelet is industrious and readily embraces change and growth. These two conditions are reflected in the physical character of the municipalities.

People come to live in Tofino because of the same charm and peacefulness that attracts tourists and they seem committed to preserving it. These same tourists however may also visit Ucluelet for many of the services provides.

The restructuring of Tofino will have a major impact on the orientation of the municipality. Under the former town limits water access was focused on the Browning Passage. Now Tofino includes those lands, and destination resorts that face directly onto the Pacific Ocean along MacKenzie Beach, Chestermans Beach and Cox Bay. These resources represent amongst the best sites in the region for commercial tourism development. The extension of the sewer and water will undoubtedly encourage new motel/hotel, campground and vacation permanent home development in this area suggesting that this area will become a focus to year-around tourism activity in the future.

7.4.1.2 Accommodation

Roofed

Within the former town limits there are five establishments with approximately 85 units. Considering the draw of Tofino this would not seem to be enough. However, the two major facilities in the area are located in the former Long Beach Settlement Area. Other than the Maquina Hotel, they are typical "Ma and Pa" operations offering hospitality and intimacy. The Schooner Inn, Mini Motel and Duffin Cove are small, attractive and fit into the village context. Only the Apaloma Motel, despite its supply of 20 units, has potentially a negative impact on the tourists' perception of Tofino. Its unkept grounds and unattractive architectural mix, strategically located at the entrance to the town, do not support the image that Tofino wishes to portray.

Tofino has five bed and breakfasts which are rarely publicized. Nevertheless they respond to overflow situations and are in keeping with the character of the town.

An abandoned Nurses' Residence is scheduled for demolition. It would seem wise at this point to consider adding its nine units to the Tofino's accommodation, at the mere cost of upgrading and recycling.

7.4.1.3 Accommodation

Roofed

The two highest quality facilities are located along Cox Bay. Pacific Sands and Ocean Village epitimize the development potential of the area. As financially successful ventures they experience approximately 100% occupancy during the entire summer and most weekends throughout the year. The Dolphin Inn also offers hospitable roadside accommodation.

An opportunity for additional units may be available at the Christie Residence. No longer a school residence, it is now on a short term lease to the Clayoquot Band Council who are addressing its multiple use possibilities. The 50 sleeping units, gymnasium, extensive kitchen and cafeteria could easily be converted into a major seaside resort if only for the summer months. A Native Museum has also been considered for this site (as well as IR #6 in Ucluelet). This location offers opportunity for an integrated attraction/accommodation food service facility.

Seasonal

The region's only concentration of vacation homes has developed along the shore at Chestermans Beach. This subdivision consists of 1/2 acre (.2 ha) lots that are still being sold at increasingly higher values. For the most part the homes are successfully integrated into the forest landscape and at this point there seems to be no problem with sewage. Water is not available.

Camping

The only two major private campgrounds on the coast are located in Tofino. Pacific Rim Resort Campground and Crystal Cove are at best marginal operations offering a mediocre product. This is not necessarily the fault of the operators who are faced with:

- low financial return typical of most campground operations;
- short season;
- exceptionally high construction costs in this area.

Pacific Rim Resorts was supposed to be a private enterprise response to campgrounds developed in conjunction with National Parks. Typically this has not happened - it is virtually impossible for the private sector to provide a service comparable to Parks Canada who have the planning staff, land and financial resources. Unless there are changes in the "Selective Campground Development Policy" this situation will remain the same.

The Parks Canada facilities are always full and the private efforts are always being compared to the services in the Park. This results in a negative experience for the operator, the tourist and consequently the entire region. However, Quest Resorts International has recently leased Pacific Rim Resorts with the intention of turning it into a high quality campground by improving the facilities, landscaping the site and providing good management.

7.4.1.3 Food Services

Restaurants

There are seven food outlets in Tofino including two of the best four restaurants on the coast (The Loft and The Schooner) with a third - the Clayoquot Lodge on nearby Stubbs Island. They respond in quality and hospitality to the needs of many of the tourists. This, of course, is a significant improvement over the situation five years ago. Their long term viability greatly depends upon increasing volume and length of season.

As well as quality dining, Tofino also offers unique eating experiences at Happy Harrys where good basic fast food is tastefully mixed with hospitality, local charm and lively conversation. It provides the type of experience that keeps Tofino in the minds of tourists and encourages repeat visitation.

A convenience store is available for campers at Pacific Rim Resorts.

Food Stores

There are three food stores, including the Co-op which responds adequately to the campers and travellers needs. Yet they lack the character and atmosphere that can enhance the buying experience.

Fish Markets

Fish/crab can be found at various locations around town - unfortunately they are not all concentrated in the dock area with other products. An attractive coffee shop is located in the town centre.

7.4.1.4 Information Services

Services consist of a sign on Route 4 (for those who stop) and at the Chamber of Commerce (for those who can find it). Information has to be accessible and properly signed or its impact is minimal. The facility should be situated in the centre of town or near the dock area where there is a high tourist flow.

There is an array of pamphlets and brochures produced by the village and the services. They are usually not distributed beyond the display area on the B.C. Ferries.

7.4.1.5 Attractions

Tofino's main attractions are its splendid beaches and its own charm and pastoral setting. It is a combination of components and features that make Tofino attractive to the visitor. They include:

- being surrounded by the natural/untouched beauty of Clayoquot Sound, Meares Island, Tofino Inlet, Pacific coast beaches, etc.
- the fishing activity along Tofino Inlet including wharves, boats, packing plants;
- the splendid beach resources at Cox Bay, MacKenzie and Chestermans Beach;
- the two best destination resorts in the region;
- the accessiblity of charters for fishing, trips to Hot Springs Cove, Stubbs Island, scuba diving, etc.;
- attractive streets and architecture (ie. Anglican Church);

Most of these "attractions" provide a base for a potentially viable commercial attraction. Although they are collectively significant, and essential to the continued growth of tourism in Tofino they do little to:

- extend the tourist season;
- increase length of stay, especially during the inclement weather;
- encourage repeat visitation;
- provide a unique experience that will significantly increase tourist volume especially in the shoulder season.

The fishing docks which are so popular are scattered along the Inlet with no apparent concentration and access is sometimes difficult and intimidating.

Charters are available on a scheduled basis to the Hot Springs. Fishing and diving charters and cruises are also available.

7.4.1.6 Recreation Facilities

Marina

While all boating services are available (gas, oil, supplies) there is no marina. However, the floating docks used by commercial fishermen are also used by pleasure boaters and sports fishermen. A ramp is available.

Parks

The Central Park provides playground equipment and picnic tables and is a pleasant diversion. Tonquin Park offers a pleasant trail to the beaches on the Pacific Side of the Esowista Peninsula. The Central Park and School are available during summer festivals and special events.

7.4.1.7 Festivals and Special Events

One festival, Clayoquot Days, is a popular and important event for both locals and tourists. Like many festivals, it attracts people to the town when visitation is already high. Several small events should be promoted, especially during the shoulder season.

The craft fair held in 1979 and 1980 was a popular event with the tourists and its revival should be considered. Community suppers, theatre events, etc. held on a continuing basis frequently have more of an impact than one major festival.

7.4.1.8 Retail Services

All the tourists retail needs are met. They are for the most part scattered along Campbell Street with the intersection at 1st Street being the only focus.

Two major craft outlets offer architectural character and quality local craft.

The Gallery above the Schooner Restaurant is one of the finest in the region with well known artist Roy Vickers providing a pleasant mix of exposition, demonstration and sales.

7.4.2 UCLUELET

Ucluelet is the largest and most dynamic community on the coast serving the forestry, fishing and tourism industry. It is remarkably different from Tofino expressing a more industrial image and appearing to have been subjected to rapid growth, transient population and not the same level of community pride. It lacks the quiet charm and village character yet its entrepreneurial spirit is expressed in many of its excellent tourist services.

Seven motel/hotels supply 173 rooms of average to very good quality and seven restaurants provide average to excellent quality.

Ucleulet is also a service and staging area for Barkley Sound. First class charter operations as well as smaller operations run trips to the Sound and Broken Group on a scheduled and unscheduled basis for:
- fishing
- diving
- whale, sea lion, bird interpretation.

The Canadian Princess has made a major effort to sell these services and has met with limited success. Any future development in Barkley Sound area will have an impact on Ucluelet.

7.4.2.1 Accommodation

Roofed

The seven establishments are located along the main road and other than the Canadian Princess offer typical in-town sleeping accommodation. Their location for the most part does little to increase length of stay.

Even the Canadian Princess, one of the most spectacular accommodations in the region only has an average length of stay of slightly more than one night[10]. Despite the high quality restoration and unique experience the small quarters, lack of view, noise, unattractive surroundings, etc. decrease the travellers' interest in staying more than one night.

Length of stay is short in all the motels[11] and this can be attributed to:
- lack of activities and attractions;
- unattractive surroundings;
- many tourists are staying in Ucluelet because Tofino is full.

[10]Interview with Owners
[11]Interview with Five Motel Owners

Some operators, such as the West Coast Motel have made a significant effort to hold/entertain tourists during inclement weather with facilities like an indoor pool and video films.

The long term plans for the Canadian Princess also suggest creating the kind of ambience and physical surrounding that constitute a resort character and consequently increase length of stay. Thirty six units will be built in 1984.

There are camping facilities at the marina and bed and breakfast.

7.4.2.2 Food Services

Restaurants

Again Ucluelet has most of the services on the coast including what is possibly the best restaurant in the region as well as pleasant dining on board the Canadian Princess.

The five other restaurants are satisfactory to very good and meet the present volume demands.

Food Outlets

Six stores including specialty items satisfy most travellers' needs.

Markets

There is one produce market and fresh fish can be found at two outlets. All the various food outlets are dispersed around the town.

7.4.2.3 Information Services

Ucluelet has two information outlets, one at the intersection at Route 4 and one in a gift store in Davison Plaza. Neither attract a

significant number of tourists because of location and visual appeal.

The Canadian Princess is the biggest promoter of Ucluelet spending thousands of dollars each year to promote fishing, diving and the Barkley Sound.

There is a variety of pamphlets on most services.

7.4.2.4 Attractions

The only significant man-made attraction on the coast is in Ucluelet - the Canadian Princess. Its attractive white hull and colourful flags add spirit and image to Ucluelet's otherwise drab and uninspiring entrance. Tours and historic information on the vessel used to be available but that was discontinued for financial and operational reasons.

The proposed motel/cabin development for this area should add to its appeal as has the recent paving of the parking lot. However, the setting on the opposite side of the street, including a junk yard and unattractive gas station (scheduled for upgrading) will have a serious negative impact on the surroundings.

Other attractions include:
- the small beaches on the Pacific Ocean side;
- the small shopping plaza;
- the Fraser Gardens;
- the marinas and fishing wharf.

7.4.2.5 Recreation Facilities

Marinas

The two marinas, (one government, one private), supplying over 100 berths, respond to the immediate demands and there are no immediate plans for expansion.

Parks

He-Tin-Kis Park provides a pleasant boardwalk trail through coastal rainforest to a secluded rocky beach. Most tourists never hear of its existence.

Other facilities such as the school and community hall are available for special events.

7.4.2.6 Festivals/Special Events

Ucee Days is a typical summer special event attracting tourists when tourism is already at its highest. Again what is more appropriate are smaller special events which entertain the visitors on a regular basis.

7.4.2.7 Retail Services

Ucluelet has the best selection of retail outlets on the coast. Its souvenir/gift outlets are attractively designed and the Da-Quah Gallery adds a Native dimension to the craft scene. The Davison Plaza if properly renovated could become an attractive focal retail centre for the community and tourists with a mix of food, gifts, laundromat, etc.

7.5 BARKLEY SOUND UNIT
WESTCOAST TRAIL UNIT

7.5.1 Bamfield

7.5.1.1 Overview

Bamfield is the smallest and one of the most pastoral villages on Vancouver Island. Located at the south side of Barkley Sound and at the end of 104 kilometres of a curvilinear gravel road Bamfield offers:

- remoteness and solitude;
- access to the Deer Group, Broken Group and Barkley Sound;
- proximity to fishing and diving;
- a quiet picturesque village experience.

Bamfield is divided into two sections (East Bamfield, West Bamfield) by the Bamfield Inlet. West Bamfield is unique in that it has no vehicle access and pedestrians move in the automobile free atmosphere by a boardwalk and small roads and trails. East Bamfield is quite a different case especially during the summer months and commercial fishing season. The central area, in particular Frigate Road and the road leading to the boat ramp at Port Desire is completely jammed with automobiles. Although most of the services are on the east side (restaurant, motel, store) much of the village's quaint quality is lost by the visual/physical impact of these automobiles, campers, trucks and RV's.

These vehicles are also the source of much of the residents' frustration with the tourists.[12] In fact, the village streets are largely used as a parking lot for many fishermen and the economic spin-offs to the community are minimal.

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[12]Discussions with 24 Citizens and Community Leaders

As tourist visitation to Bamfield increases, two conditions will have to be faced:

- the continued dissatisfaction of the locals, especially with the sports fishermen who come here only because of its access to Barkley Sound and Alberni Inlet;
- the very features that attract sightseers to this coastal village could actually be destroyed resulting in a loss of those visitors who economically contribute to Bamfield.

Despite the difficulty of access, Bamfield could experience significant growth over the next decade. The abundance of natural attractions, as well as its unique setting make it appealing to a variety of tourists including a growing number seeking refuge from of city life. Bamfield citizens will probably want to capitalize on that growth but not at the expense of their quality of life. For many, they have already given up too much.

7.5.1.2 Accommodation

Roofed

The Bamfield Trails Motel has 15 units with another eight under construction. The Aquilar House provides another 10 rooms and cottages, (minimum length of stay - 3 days) and there are a number of cottages for rent on both sides of the Inlet. There are five units available as part of a fishing package at the Seabeam Lodge. Exact occupancy rates were not available. Discussions with owners indicated close to capacity conditions during the summer months with potential for additional units during July and August. However, low visitation in both the shoulder season and winter (the Aquilar House closes for the winter) suggests that the one motel can accommodate both tourists and visitors to the Marine Station. The outstanding natural resources would seem to support a potential high quality resort but access to Bamfield is difficult and there will continue to be low winter visitation.

Camping

The only official campground is the Seabeam Campground which claims 60 sites. While this number may be accurate, the quality of those sites - many recently cleared by a bulldozer - is not in keeping with the image to which Bamfield should aspire. However, if parking restrictions are enforced on Frigate Road, this facility could serve as a temporary alternative.

The Pachena Bay Campground (Indian Reserve 12), situated on one of the most attractive beaches in the region, is usually open but its distance from the boat ramp, its frequent disruption of service and cost do not make it attractive to all visitors.

On-Street Parking (RV's)

Although not strictly "accommodation", many visitors (fishermen in particular) leave both RV's and boat trailer at random along the village streets and in the gravel pit. These groups enjoy the benefits of the region, and "leave with the fish", but generate little money in the area.[13] The parking of their vehicles is a disturbance to both locals and those visitors who would normally use this community as a quiet retreat.

7.5.1.3 Food Services

Three convenience stores exist in Bamfield (2) and on Indian Reserve 12. They serve the needs of the camper, boater and hiker.

The one restaurant in Bamfield is adequate in size and quality and while busy in the summer business dwindles after the tourists and commercial fishermen leave. There is no official location to buy fish and fresh produce.

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[13]Frequent complaint of more than 50% of local residents interviewed

7.5.1.4 Information Services

An information bureau was established this year. It also serves as an outlet for the many fine crafts produced in the village.

7.5.1.5 Attractions

Bamfield's attractions are mostly natural yet there are some man-made facilities of interest.

Natural

- The West Coast Trail
  With constant national and international exposure, by Parks Canada, this trail is now attracting 6,000 users/year[14] with many using the restaurant and showers in Bamfield before boarding the Lady Rose. Their economic impact is significant but their stay is short.

- Beaches/Cape Beale
  Pachena, Keeha and Brady's Beaches and Cape Beale, (Pachena Lighthouse) are excellent hikes for those staying long enough in the community to enjoy its west side. These hikes can occupy a day necessitating an overnight stay or two in the town.

- Deer Group/Barkley Sound/Poett's Nook
  While most visitors to the region are fishermen seeking the salmon of Barkley Sound there is opportunity to encourage a more diverse group of tourists interested in the boating, camping and diving resources of Barkley Sound. "The Graveyard of the Pacific", the coastal caves and blowholes should be promoted.

Man-made

- The Boardwalk
  The West Bamfield Boardwalk, maintained by the Department of Highways is an attractive and unique attraction. The views across the inlet, the points of interest along the way, the link to the

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[14]Parks Canada Statistics

Brady's Beach trail and its link between the various floating wharves create the type of basic requirements to develop a novel attraction.

- Bamfield Marine Biology Station
  This building, formally the eastern end of the Trans-Pacific Cable, now serves as a marine biology station. It offers tours.

- Alternative Energy Display
  Bamfield gets its electricity from diesel generated engines. B.C. Hydro is presently investigating alternative forms of energy. Should the option prove to be solar, wind, small hydro, etc. the facility should also be considered as a tourist demonstration attraction.

7.5.1.6 Recreation Facilities

Marinas

There are no marina facilities at Bamfield, however, there are floating docks and services available. A marina is being proposed which should respond to the market requirements.

Community Hall

The hall is only used for local events and it could be used for village suppers, craft fairs, etc.

7.5.1.7 Festivals/Special Events

There is no special event that is an attraction for tourists.

7.5.1.8 Retail Outlets

Both grocery stores sell dry goods which serve the camper. Crafts are sold at the Information Centre.

7.6 HUMAN RESOURCES

7.6.1 Population and Labour Forecasts

The population of the Alberni-Clayoquot region was 32,558 in 1981. Of this total, 37% were between the ages of 15 and 35. Unemployment in the lower two-thirds of this range is well above the Provincial average. For example, for females in the 15-24 age group the rate of unemployment in 1981 was 21.8% compared to a Provincial figure of 10.5%.

The major occupational groups are in the primary and manufacturing industries which probably accounts for the fact that the overall unemployment rate is also well above the Provincial average.

The average annual income in the region is higher than average for males but lower than average for female members of the labour force. Total family income, however, is slightly higher than the Provincial figures.

Despite these levels, there is still about 9% of the families in the region who are considered to be "low income" by 1978 standards. More significantly, over 31% of unattached individuals were considered to be in the same category.

The level of education in Alberni-Clayoquot is somewhat lower than average with 33% of the population over the age of 15 having completed some form of post-secondary education. The Provincial figure is 43%.

Net internal migration for the region between 1976 and 1981 was negative. During that 5 year period more people moved out of the region than into it. Overall, the population grew by about 400 people.

Despite this negative migration, 73% of the dwelling units in the region are owner-occupied, compared to only 64% throughout the Province. This may relate to the fact that 49% of the population had been in the region for more than five years. Provincially, only 43% of the population demonstrates this degree of stability.

It is apparent from these few characteristics that the region does have the human resources required to participate in employment opportunities generated by the tourist industry. With high unemployment among women, and a substantial proportion of the labour force reporting low income, such opportunities should be welcome.

The development of tourism should also help to provide alternative fields of employment to the primary and secondary industries which now predominate. These sectors can be complementary and work to off-set temporary and seasonal declines. In addition, the introduction of more service-sector jobs would provide training opportunities in occupations which are readily transferable from place to place should the need arise.

From the employers point of view the relative stability of the resident population and their apparent commitment to the area should be encouraging factors in making locational and investment decisions.

7.6.2 Community Resources

All of the communities have shown a high level of community dynamics. Port Alberni and Tofino would seem to have exceptionally high community spirit and volunteerism. In Port Alberni there are 13 major festivals or special events that, although oriented towards locals, holds an attraction for many visitors to the city.

It is this spirit, creativity and talent that can be used in developing programs that will contribute to increasing the length of stay in Region.

Tofino has also shown remarkable community cohesiveness on the Meares Island issue. Again it is this type of community dynamics that can make a positive contribution to tourism.

Bamfield, while very skeptical about tourism also has a level of sophistication that can be channeled to specific activities and the establishment of attractions.

All communities appear to be remarkably hospitable.

7.6.3 Socio-Economic Characteristics

This sub-section provides an overview of the socio-economic characteristics of the Alberni-Clayoquot Region. The regional trends in employment industries, population and housing have been indicated for the years between 1971 and 1981. The information is primarily based on Statistics Canada census data and supplemented by secondary data from economic reports on the Region.

The major change in the socio-economic profile of the region is associated with employment industries. Between the years 1971 and 1981 more jobs have been created in tertiary industries than in the primary and secondary industries which comprise the economic base of the region. Population and housing trends have remained relatively stable in this period.

7.6.3.1 Regional Employment Industries

Regional employment by industry is given in Table 2. There has been an increase in jobs from 10,284 to 15,745 during 1971 and 1981. In 1980 the economic base of the region was forest products followed by fish products in the primary and secondary industries. These industries have continued to play a prominent role in the economy although they provided fewer jobs between 1978 and 1981.

Employment in tertiary industries has increased from 37% in 1971 to 48% in 1981. Tertiary industries are nearly as important to the regional economy as primary and secondary industries. Employment projections for 1991[15] show an increase in jobs particularly in trades and services. Tourism is expected to account for the majority of these jobs.

7.6.3.2 Regional Population

The region's population has increased slightly from 31,760 in 1971 to 32,558 in 1981 and is projected as 44,149 in 2006. The population is expected to remain stable over the next 10 years with substantial increases between 1991 and 2006. Most communities of the region have experienced a marginal population growth, and Port Alberni's population has been on the decline between 1976 and 1981 (refer to Table 3).

TABLE 3

POPULATION BY MAJOR COMMUNITY

	1966	1971	1976	1981
Port Alberni	18,538	20,080	20,044	19,892
Ucluelet	1,054	1,025	1,210	1,593
Tofino	477	455	623	705
Other	7,741	10,200	10,302	10,368
Total for Region	27,810	31,760	32,179	32,558

Source: AVG Management Science Ltd.
1981 Census, Statistics Canada

15"Alberni-Clayoquot Region Economic Profile", AVG Science Management Ltd., 1980, p.A3

TABLE 2

EMPLOYMENT BY INDUSTRY

CLASSIFICATION	1971	1978	1981
Primary Industry (Agriculture, Fishing, Mining, Forestry)	2,515	2,850	2,600
Manufacturing Industry	4,345	5,300	4,870
Construction	200	510	720
SUB-TOTAL SECONDARY	4,545	5,810	5,590
Transportation Communications and Other Utilities	370	430	870
Trade	2,430	1,770	2,040
. Retail	(1,330)	(1,550)	
. Wholesale	(100)	(220)	
Finance, Insurance and Real Estate	140	330	455
Community Businesses, and Personal Service Industries	1,375	2,280	3,430
Public Administration and Defence	470	750	760
SUB-TOTAL TERTIARY INDUSTRY	3,785	5,540	7,555
TOTAL ALL INDUSTRY	10,284	12,975	15,745

Source: AVG Management Science Ltd.
1981 Census, Statistics Canada

Table 4 provides a summary of the population, labour force and employment opportunities of the region. Employment has increased at a higher growth rate than the regional population, and there has been a significant increase in labour force between 1976 and 1981. Unemployment, however, has been on the rise since 1976 and reached 10% by 1981. This trend corresponds to that of the Province and is probably attributable to the economic recession.

TABLE 4

POPULATION, LABOUR FORCE AND EMPLOYMENT
Alberni-Clayoquot Region Totals

	POPULATION	LABOUR FORCE	EMPLOYMENT	UNEMPLOYED (Official)
1971	31,760	11,732	10,845	8%
1976	32,174	13,920	12,975	7%
1981	32,558	16,035	14,365	10%

Source: AVG Management Science Ltd.
1981 Census, Statistics Canada

The age structure for the region in 1981 is 36% under 20 years of age, 57% in the 20-64 age group, and 7% in the over 65 age group (refer to Table 5). Between 1976 and 1981 there has been a number of significant changes in the age structure. The number of children has declined by 4% and over 20 age groups have increased by 2%.

7.6.3.3 Housing

The number of dwelling units by type of structure is given in Table 6. The number of single family dwelling units has increased substantially from 7,705 in 1976 to 8,645 in 1981.

There has been no significant change in the number of multiple dwelling units. The overall occupancy figures for the Region show 73% of the dwellings as owned rather than rented in 1981. This figure is consistent with the 1976 census data.

TABLE 5

POPULATION BY AGE & SEX GROUP
Alberni-Clayoquot Regional District

AGE GROUP	CENSUS 1971	%	1976 CENSUS MALE	FEMALE	TOTAL	%	1981 CENSUS MALE	FEMALE	TOTAL	%
0-4			1,430	1,310	2,735		1,375	1,295	2,670	
5-9			1,575	1,465	3,020		1,395	1,310	2,705	
10-14			1,810	1,745	3,555		1,575	1,425	3,000	
15-19			1,805	1,590	3,395		1,715	1,605	3,320	
Sub-Total 5-19			5,190	4,800	3,395		4,685	4,800	9,025	
Sub-Total 0-19	13,605	43	6,620	6,110	12,725	40	6,060	5,635	11,695	36
20-24			1,595	1,475	3,070		1,615	1,410	3,025	
25-34			2,670	2,390	5,060		2,940	2,745	5,685	
35-44			1,990	1,765	3,755		2,080	1,950	4,030	
45-54			1,250	1,580	3,305		1,805	1,510	3,315	
55-64			1,250	1,230	2,485		1,290	1,345	2,635	
Sub-Total 20-24	16,595	52	9,230	8,445	17,675	55	9,730	8,960	17,675	57
65-69			405	340	745		445	445	900	
70+			470	545	1,020		595	545	1,280	
Sub-Total 65+	1,545	5	875	885	1,765	5	1,040	1,140	2,180	7
Sub-Total 20+			10,105	9,330	19,440		10,770	10,100	20,870	
TOTAL		100	16,720	15,455	32,175	100	16,830	15,735	32,565	100

Source: AVG Management Science Ltd.
1981 Census, Statistics Canada

TABLE 6

HOUSING

Alberni-Clayoquot Region Totals

	1971	1976	1981
Population 0-19 yrs. old	13,594	12,725	11,675
" over 19	18,166	19,440	20,870
" total	31,760	32,175	32,565
Single Dwelling Units	7,205	7,705	8,645
Multiple " "	1,330	1,455	1,470
Mobile " "	260	680	-
Total " "	8,795	9,815	10,115

Source: AVG Management Science Ltd.
1981 Census, Statistics Canada

7.6.4 Interview Process

The inventory/analysis of tourism resources and markets involved four specific yet interdependent steps.

1. On site visits to all the major natural and man-made attractions and services in the region.

2. Interview and "involvement of the principal actors in the development of physical resources"[16].

3. A questionnaire, based on the '79 Visitor Survey of 300 visitors to the region during the last two weeks of July 1983.

4. A total review and careful scrutiny of more than 15 documents dealing with the visitor markets to the region.

The interview of local tourism operators, politicians, community leaders formed an important part of the data gathering process and their information is essential to this background/technical report.

The questions are outlined in Appendix III and lists of more than 120 people interviewed are found in Appendix IV.

Purpose of Interview

The interview process is one of the most important tools in accessing the tourism development potential of a region. Not only do those interviewed have key insights into the opportunities and constraints of tourism but they also have the ability to make changes in the development and the management of the tourism system.

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[16]Crane Russak, Gunn Glare, "Tourism Planning", Crane Russak, New York, 1980.

Interviewing most of the actors, or what Gunn calls the "action agents", is very difficult because of the complex nature of tourism. Don Dobbins, project director for the South Carolina Overall Recreation Plan Exchange Council, when told that the planning process would be based on direct contact with the providers of recreation/tourism services, noted that "most members of the Council were skeptical expecially some of those from the private sector".[17] He summed up his comments however by stating that "reaction to the process and acceptance of the organization has far exceeded anything we ever dreamed of".

A direct interview process is generally more favourable than a questionnaire approach for gaining insights into regional tourism. Many community leaders of the Alberni-Clayoquot region have limited experience in tourism development with the industry being relatively new. Lengthy interviews were therefore necessary before the consultants could sense how various governments and locals perceived success and growth in tourism in Alberni-Clayoquot.

Standard questions were asked at each interview depending on their position and the information was tabulated based on an approach used by the Ontario Ministry of Industry and Tourism.[18]

Table 7, titled "Perspectives of Key Actors in Alberni-Clayoquot Tourism", details the results of the interviews under the following heading:

- Type of Actors
- General Purpose/Mandate
- Planning/Development Issues
- Comments

It should be mentioned that most of the key individuals in the region were contacted. Therefore, this list represents more than just a sampling but rather a comprehensive statement by those most involved in tourism.

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[17]Dobbins Dan, "South Carolina Overall Recreation Plan Exchange". Council, "South Carolina Department of Parks, Recreation and Tourism, 1976".

[18]"Opportunities for Development", Ontario Ministry of Industry and Tourism, 1976.

TABLE 7 Perspectives of Key Actors in ALBERNI-CLAYOQUOT Tourism

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
INDIVIDUAL OPERATOR - Restaurants	- Provide food services to travellers and locals and maximize profits.	- Can only be assured of success for a 3 to 4 month summer period. Locals support the services during off season in Tofino, Ucluelet, Bamfield. - Despite peak loads the existing plant could serve an increased volume, especially in Port Alberni. - Difficult to provide fresh seafood because changing weather affects length of stay. - Promote region to increase overall volume.	- Restauranteurs report that tourists generally approve of available food outlets. - Available, qualified staff. - Would like more investment support from government.
HOTEL/MOTEL	- Provide accommodation to business and travel markets and maximize profits.	- Only those properties associated with the beach operate successfully during the winter. Increase volume in shoulder season. - Over supply of rooms in Port Alberni. Requires special events and attractions to fill rooms. - Coordination of reservation system between Port Alberni and Tofino/Ucluelet Coastline Unit. - Quality, beach location operations are the most successful. - Need more attractions to increase length of stay and provide activities in inclement weather.	- Upgrading existing facilities more important than building new rooms. - More investment support required from government. - Difficult to realize the necessary 25-30% R.O.I. required to attract investors.

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
CAMPGROUNDS	- Provide accommodation for the camper and recreation vehicle owner.	- Weather conditions significantly affect the length of stay. Need for attractions to entertain users during rainy weather. - Increasingly difficult to provide quality campsites at competitive prices. - Land and construction costs are high, making it difficult to generate a return on investment. - Difficult (impossible) to operate in such a short summer season.	- Parks Canada is consistently the favoured camping area and operates at 100% occupancy. There will be no additional campground construction by Parks Canada while its agreement with the private sector remains. - Campers are reasonably self-sufficient and do not spend much money.
MARINA	- Provide moorage space and services for the local and travelling recreation boater.	- Increasing demand for more moorage space especially combined with overnight facilities (recreation vehicle parking). - Frequently must compete with lower cost Dept. of Transport facilities. - More fuel outlets in Barkley Sound.	- If the Federal Government is going to build wharf space they should charge fees as high as private enterprise.
FISHING CHARTERS	- Provide boat, equipment and guides for sport fishing.	- Increase docking space throughout the area. - Need for more boats during peak season. - Port Alberni should promote sport fishing as an industry.	- Closure of the mill resulted in more available charters and the formation of the Alberni Salmon Charter Association. - Return of 5 year old fish to hatchery has been a big boost to sport fishing.

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
DIVING CHARTERS	- Provide boat, equipment accommodation and access to dive sites.	- Lack of promotion compared to competition (e.g. Powell River). - Needs more creative and quality packages. - Potential for "fly-dive" packages to Ucluelet/Tofino.	- There is both high quality and low quality products. - The market is growing slowly but steadily.
MARINE SIGHTSEEING	- Provide boats and interpretive services for marine sightseeing.	- If the weather is poor there should be alternative attractions to satisfy customers. - Increase of sightseeing vessels may push mammals further offshore. - Package tours may experience a tremendous growth over next few years.	- Lack of dependancy of attraction (i.e. whales do not show up). - Sightseeing is a major portion of charter business.
PACKAGE BUS TOURS	- To provide transportation and access, throughout the region from within and outside the region.	- Travel to the area by other than auto will only increase if there is well developed package tours. - Certain market segments are prepared to leave their car and take short tours within region.	- Bus transportation is particularly appropriate in the Port Alberni area, Tofino Airport, and between Ucluelet and Tofino.
AIRLINES	- To provide quick access from such major visitor origins as Vancouver, Victoria, Seattle, and Okanagan Valley.	- The Tofino airport is not used to its potential and could be used to attract fly-drive fishing parties, resort visitors, scheduled flights. - Need greater volume of tourists to increase service promotion oriented to the wealthier resort user.	- Schedule service from Vancouver can be successful. This could improve with higher demand. - Limited winter schedule flights because of low demand.

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
AIRLINES (cont'd.)		- Need ground transportation (Bus, Car Rental) packages at the airport. - Port Alberni should have its own airstrip.	- Need larger aircraft (i.e. Dash 7) to accommodate packages.
LOCAL CHAMBERS OF COMMERCE	- Improve the business environment in the community.	- More co-operation between the various communities, e.g. Tofino/Ucluelet. - Attractions and events are required to draw more people and increase length of stay. - More promotion of the unique natural features of the region will result in increased visitation and spending in the municipalities. - Tourism should be integrated with other industries. - Each municipality has a variety of attraction opportunities that should be developed, e.g. Mill or Plant tours, historic sites.	- Many of the Chamber members are involved in the tourism industry, especially in Ucluelet. - Minimal communication between different communities on tourism related issues.
ECONOMIC DEVELOPMENT COMMISSION	- To provide financial and advisory services to business in order to stimulate industrial growth, economic development and employment opportunities.	- Slower growth or decline in the major industries (forestry, fishing) will mean that tourism will play a more significant role. - Development must be based on the existing natural resource base. - The region needs more publicity to successfully compete.	- Tourism is important tool for development of the region. - No group has been identified to be responsible for regional tourism development, although the EDC has a tourism committee.

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
ECONOMIC DEVELOPMENT COMMISSION (cont'd.)		- Need for good market research. - Need for better signage and information services.	
PARKS CANADA	- Control, development and management of Pacific Rim National Park for future generations.	- The National Park will continue to be the major attraction to the region but can not sacrifice certain park values for tourism. - Initial park investment has been made and the level of investment will not greatly expand over the next 3-5 years. - The region should promote its natural features - much of the publicity is now done by Parks Canada. - The Park is attracting more package groups and must adjust its facilities. - The region has many representative biophysical units that have recreation/tourism potential. - Parks Canada cannot consider campground construction until private enterprise agrees.	- The Park has been a significant part of the transition of this region to a Tourism Destination Area. - Different management units have different influences throughout the region. There are major pressures on the West Coast Trail. It is becoming increasingly difficult to manage the Broken Group because of unlimited access. - The Park is a stimulus for private enterprises such as nature interpretation tours, campgrounds, etc. - Different from Olympic National Park in Washington. - West Coast Trail will become more accessible with the expanded logging road network.
MUNICIPAL COUNCILS AND MAYORS	- Serve the interest of the residents.	- Each municipality has stated a definite interest in tourism, however orientation varies depending upon existing economics, attitudes of citizens, and potential resource development.	

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
MUNICIPAL COUNCILS AND MAYOR (cont'd.)	- Promote optimal growth of the community.		
PORT ALBERNI		- Harbourfront is the first major involvement in tourism and upon completion will have a major impact on visitation. - A number of significant natural resources in the surrounding area can be served by Port Alberni. - Present signage is inadequate. - Need for expanded recreation vehicle (campground) services to serve those visiting the City. - More promotion needed to fill the many available accommodation units. - Increase relationship with coastal areas so tourists stay in Port Alberni if their motels are full. - Increase access to the Alberni Inlet, i.e. Lady Rose.	- Tourism is seen as an alternative revenue and employment creator, especially since the recent decline in the forest sector. - The Harbourfront development must be carried through to completion before it will have its full impact on tourism. - The information center serves the region. - Any development should reflect social/environmental conditions.
PORT ALBERNI PARKS DEPARTMENT	- To provide a park and recreation opportunities for local residents.	- There is a need for co-ordinated provision of services to people adjacent to the boundaries of the City of Port Alberni, (regional here means the areas immediately adjacent to PA; the benefitting area).	- Focus is the City of Port Alberni and the adjacent areas.

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
PORT ALBERNI PARKS DEPARTMENT (cont'd.)		- Use of Day Creek Campground as a campground by City Council; Parks and Recreation Commission and staff want it as a local park.	
UCLEULET		- Tourism must be developed but not at the expense of other industries. - Provide more opportunities for access to Barkley Sound. - Supply tourist services to entire region to keep them longer. - The town should express West Coast logging and fishing. - Preserve special natural areas in town for tourists. - Increase winter opportunities.	- The town's size can handle many people. - Maintain equal proportion of logging, fishing, government and tourism. - Do not want land tied up by tourism.
TOFINO		- Develop attractions that relate to the waterfront. - Increase access to Clayoquot Sound and establish salmon enhancement program. - Area needs more promotion. - New infrastructure will open up many new opportunities. - Meares Island preservation is important to the future of tourism in Tofino.	- Tourism must not interfere with the existing quality of life. - Tourism must be considered on a more year-round basis. - A regional tourism association two should have groups - Port Alberni and Coast (ie. Tofino, Ucleulet). - Tofino used to have a festival which may be revived.

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
TOFINO (cont'd.)		- Tofino needs Marina Services.	- Opportunities in arts and crafts productions and sales.
BAMFIELD RDAC Representatives and and Community		- Must resolve campground issue to improve local perception of tourism. - Need a tourism product that attracts more than just sports fishermen. - Excellent harbour and access to Deer Group and Broken Group, and their natural resources should be stressed. - Better moorage facilities required.	- A focus for many natural resources in the area. - Need an extended season because of putential good weather in winter. - People want to protect their lifestyle here but may be resigned to the fact that tourism will increase. - Sports fisherman represent 80% of visitors.
NATIVE BAND COUNCILS	- To assist in the planning and economic development of their individual bands. - Stimulate growth and employment for band members.	- Most tourism development issues are on hold until land claim issues have been resolved. - Christie Residence should be developed as a high quality motel as well as potentially the site for a native museum. - Pachena Bay campground has achieved its maximum development potential.	- There are many potential opportunities for native people but they must be developed in the context of particular band issues and overall land claim negotiations. - Tourism could have an impact on 75% rate of unemployment.
VANCOUVER ISLAND TOURISM ASSOCIATION	- Assist and coordinate tourism marketing research and development on Vancouver Island.	- Encourage the development of the year-round unique natural resources based attractions and services. - New accommodation should reflect the needs of the contemporary markets.	- Regional Districts have not generally contributed to tourism development.

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
VANCOUVER ISLAND TOURISM ASSOCIATION (cont'd.)		- Events should cater more to tourists including seafood dinners, tour packages, etc. - Avoid the excessively commercial type of attractions. - Develop a regional tourism association with access to an integrated reservation system. - Promote bed and breakfast. - Increase overall access within the region.	- More promotion would have significant impact. - Tofino airport could be playing a more significant role.
REGIONAL DISTRICT OF ALBERNI-CLAYOQUOT	- To provide regional service and local services in unorganized areas.	- Focus on attractions and events that are of a regional significance. - Develop opportunities that provide a balanced tourism development throughout the region. - Development options should recognize the new infrastructural services in Tofino and Ucluelet. - Recognize the orientation of the various community and settlement plans. - Suggest opportunities that promote the interdependance of each community.	- Provides local tourism operators with advice on planning issues. - Involved in the physical development of such attractions as Della Falls and Mt. Arrowsmith.

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
MINISTRY OF TOURISM	- To enhance the Province's competitive position in the national/international tourism market.	- Need to promote the Province as a whole and consequently increase (tourism) destinations to Alberni-Clayoquot.	- For Alberni-Clayoquot to develop as a destination region, the logging/tourism conflict must be resolved.
	- Increase tourism revenue and employment.	- Need to generate up-to-date market statistics that provide assistance to operators, planners and investors.	- There must be a more comprehensive, well-rounded tourism product in the region.
MINISTRY OF FORESTS	- To promote the development of the forest industry and to maximize yields on crown lands.	- None of the 5 year plans are in direct conflict with tourism use. Although cutting will take place up to the National Park Boundary in the Long Beach and West Coast Trail Unit, impact will only be visual.	- Logging is not considered to be in conflict with tourism. Visual impacts have been considered by involving landscape planning.
		- Future areas of visual impact will be Barkley Sound and Meares Island.	- A portion of Meares Island will be subjected to a 20 year plan.
MINISTRY OF ENVIRONMENT (FISH AND WILDLIFE BRANCH)	- Protect and enhance fish and wildlife.	- Cost of enhancement and stock of fresh water lakes restricted by budget restraint.	- Lake fishing generally used as local recreation.
MINISTRY OF MUNICIPAL AFFAIRS	- To provide planning and advisory services to municipalities.	- The Ministry supports tourism development that contributes to the positive growth of communities.	- Although there is no policy on tourism, it is considered as an integral part of many municipal industrial strategies.
MINISTRY OF LANDS, PARKS AND HOUSING (Parks Branch)	- Provision of park and recreation opportunities for residents of B.C. and tourists.	- Provincial parks is unwilling to develop a campground at Toquart Bay that would be merely a bedroom for Pacific Rim National Park. The Federal Government should take on this responsibility.	- An area must have some attractive features to be made into a park, it should not just be a "motel" by the highway.

TABLE 7, Cont'd.

TYPE OF ACTOR	PURPOSE/MANDATE	PLANNING/DEVELOPMENT ISSUES	COMMENTS
MINISTRY OF LANDS, PARKS AND HOUSING (Parks Branch) (cont'd.)		- Increased fishing activity in Barkley Sound will lead to greater seasonal pressure on the land base in adjacent areas. - The Parks Branch will expand facilities near tourist attractions if there is an increase in demand.	- There are larger numbers of people coming to the area who want to camp rather than stay in motels.
DEPARTMENT OF FISHERIES AND OCEANS	- Protect and enhance fish stocks and habitat.	- Resolve the conflict between sports and commercial fishing on the Alberni Canal.	- Robertson Creek Hatchery has played a major role enhancing the numbers of fish.

8.0 TOURISM ACTIVITIES

Tourists are drawn to a region for more than just the natural, cultural, and social attractions. Although these factors are important in travel decisions. It is usually the physical features (beaches, resorts, restaurants, etc.), that provide the tourism experience and consequently the most important draw.

A well-balanced regional destination tourism provides an integrated and balanced selection of activities. These activities are:

- land based;
- water based.

Because Alberni-Clayoquot is a coastal region with a mountainous and lake interior the opportunities for a balanced system are excellent and should be the basis for an integrated concept where visitors have the opportunity to freely exchange between the two.

While actual participation rates for the various activities are not available, it is possible through the analysis of market data combined with local interviews to determine which are the more popular activities and consequently respond to existing market demand.

8.1 LAND BASED ACTIVITIES

8.1.1 Sightseeing

Since the Pacific Rim National Park is the major attraction it can be assumed that most people come to the region to observe nature. The Visitor '79 Survey indicated that 54.9% listed "sightseeing" as the most important activity in the area.

The Park has an example of most of the natural features, within the coastal region that enhance the viewing potential, including:

- offshore islands
- long uninterrupted beaches

- offshore islands
- long uninterrupted beaches
- rain forests
- distant mountain vistas
- wildlife, etc.

The interior natural landscape also holds variety for visual interest including:
- lakes, streams, falls
- valley corridors, eg. Route 4
- mountains

The developed areas with their typical village character such as Tofino and Ucluelet, also provide visual interest in the way of:
- fishing boats
- wharfs
- industrial activity
- coastal architecture
- pastoral setting
- passive human activity

It is this comprehensive mosaic of visual images that gives the tourist an understanding of the region. The quality of these images is based on:
- pleasant settings
- total understanding of what is being seen
- diversity of images (exposure)

Sightseeing is possible from road, water or air.

8.1.2 Beachcombing

With Pacific Rim National Park as the main attraction most visitors come to the region "to walk Long Beach". It is a fascinating experience during any season with the uninterrupted sound of the surf mixed with the smell of the sea and the anticipation of finding a glass float. This activity caters to all ages and should be highly promoted.

8.1.3 Camping

Campsites are available throughout the region offering a variety of experiences, and their popularity attracts many people in recreation vehicles, campers and vans, etc. looking for an inexpensive vacation.[1] Parks Canada provides the best accommodation with provincial parks as well providing reasonable campsites. Although some of the private campgrounds have excellent locations the camping experience is not satisfactory for many. In typical west coast terrain, it is difficult for private enterprise to provide quality camping at reasonable prices without government assistance. Both developed and primitive sites (Broken Group) are available.

8.1.4 Hiking/Backpacking/Strolling

Away from the beach there is a complete spectrum of hiking/strolling experiences that range from:

Demanding - West Coast trail
- Della Falls
- Meares Island

Easy - Cape Beale
- Kennedy River Rest Areas
- Rain Forest Trail
- Terrace Beach (He-Tin-Kis)

Relaxing - Bamfield boardwalk
- Wharf areas
- etc. etc.

8.1.5 Picnicking

Picnic sites can be found throughout the region at rest areas, boat ramps, beaches, parks, etc.

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[1]Visitor '79 indicates 57% of visitors to Tofino/Ucluelet and 27% to Port Alberni stayed in campgrounds.

8.1.6 Interpretation/Education

Only Parks Canada has made a major effort to provide land-based interpretive exhibits, signage and demonstrations. Through the use of guided walks and a soon to be completed theatre, it will be possible for visitors to receive a comprehensive exposure to the natural resources of the west coast. Museums in Tofino and Port Alberni also relate part of the historic values of the region.

The visitor however receives little or no information on the:
- fishing/logging industry
- native culture

8.1.7 Hunting

Hunting is practiced throughout the inland on tree or farm licensed areas. Black tailed deer and bear are the favoured species.

8.1.8 Skiing

Mount Arrowsmith is the only location for Alpine and Cross Country Skiing. Tourists rarely come to this region for these activities.

8.1.9 Horseback Riding

Deer Creek Ranch provides trail riding for both locals and tourists.

8.1.10 Berry/Mushroom Gathering

Despite abundant resources, this activity is only practiced by locals.

8.2 WATER BASED ACTIVITIES

The water based activities are varied and occur during specific times of the year. Fishing, sightseeing, touring, and diving usually take place in Barkley Sound, Clayoquot Sound and Alberni Inlet. Services connected with water based activities are located in the major communities.

8.2.1 Fishing

Fishing is the most popular water based activity in the area. There is a commercial and sport fishery for salmon in salt water, and a sport fishery for trout in freshwater. Other fish such as rockfish and ling cod are fished by sport fishermen as well.

Commercial fishing starts in early June with a gilnet and seine fishery for Sockeye, and ends around the 3rd week in July. A gilnet fishery for springs occurs during the last 3 weeks in August. These fisheries are controlled by Fisheries and Oceans and fishing is open only 2-3 days per week. Fish boats from other communities (Victoria, Vancouver) arrive in the area and may stay for the complete season, June to September 1st, or only for part of the time. When boats are not fishing they moor at Ucluelet, Tofino, Bamfield and Port Alberni, usually at government wharfs. During the peak of the season, it is common to find hundreds of commercial vessels setting nets along the inlet and throughout Barkley Sound. As the adult salmon move through Barkley Sound up the inlet to their spawning grounds the commercial fishermen will follow this route.

The sports fishermen will also follow the same route as the adult salmon. During May to July they fish in Barkley Sound for spring and coho salmon. From August to September they follow the fish up the inlet. During the August long weekend there were 400 pleasure boats along 17 miles of the inlet. The salmon derby occurs during the labour day weekend and attracts numerous pleasure craft. By the end

of September the majority of tourists have gone. There is a sport fishery for winter Spring Salmon from November to April. However, locals and very keen tourists are attracted to this fishery .

With the number of sport and commercial vessels fishing a small area such as Alberni Inlet it is forseeable that congestion would be a major problem. In the past this certainly was true. However, Federal Fisheries ensure that both the commercial and sport fishermen know when openings occur. When the area is opened for 2 days of commercial fishing the majority of the sport fishermen choose not to fish. According to the fishery officer this system is working very well (MacCullan, pers. comm.).

All of the large lakes are currently utilized by sport fishermen. Rainbow trout are fished year round by tourists and the locals. Smaller lakes located off logging roads (Elsie, Toy, June, and Junior) are stocked by the Department of Fish and Wildlife. These lakes offer good fishing, but appear to be utilized by locals only.

8.2.1.1 Facilities

The facilities required by sports fishermen consist of boat rentals, launching ramps, charter boats (including a guide), moorage and fuel. Existing facilities are listed by area.

Sproat Lake - The Provincial Park provides boat launching, and small boat rentals are available.

Port Alberni - 13 charter boat operators, of which three are associated with hotels and boat rentals, with or without a guide, are available. There are 2 marinas providing moorage and fuel. Space is a premium during the summer where it is not uncommon to have line-ups before sunrise at launching ramps.

- at China Creek (14 km SW of Port Alberni) facilities for camping, boat rental, moorage, launching and fuel are available. Facilities are presently being expanded.

Barkley Sound - Poett Nook provides a boat ramp and moorage.
- Toquart Bay provides a boat ramp with a relatively safe access to the Broken Group Islands.
- Bamfield has boat rentals, charters, fuel, moorage and boat ramps.

Tofino - 3 charter operators, fisherman's wharf and ramp.
- small rental boats are used to fish Clayoquot Sound.

Ucluelet - 5 charter operators, government wharf, ramp and fuel station.
- depending on size of boat and weather conditions, tourists can access the Broken Group Islands from Ucuelet.

Great Central Lake - one resort provides boat rentals and launching ramp.

Kennedy Lake - two boat ramps are available.

Sport fishing in Barkley Sound is restricted by availability of fish and fishing facilities. In the past both the commercial and sport fisheries have decreased the natural salmon stocks in the Sound. Robertson Creek Hatchery has increased the number of adult coho and springs returning to Barkley Sound. 1983 was the first year that the 5-year old returns have shown positive results for sport fishing and large springs are being caught throughout Barkley Sound and Alberni Inlet. Over the next few years the number of 5-year olds will increase and make Barkley Sound a very popular fishing location[2].

[2]Interview with Fisheries Officers and the Alberni Salmon Charters Association

During the summer most of the facilities are completely booked and there seems to be a need for more charter operators, boat rental facilities and especially marinas providing fuel and moorage.[3] There is therefore a potential for the sport fishery to grow, however, the lack of facilities prevents it.

8.2.2 Sightseeing

Sightseeing as a water based activity pertains to both marine topography and marine life. Tours are available on large and small vessels. The Broken Group Islands, rugged shore lines and sandy beaches, when seen from the water provide the tourist with a very different perspective of the region. Combined with the marine life itself the tourist can experience the natural resources of the "west coast".

While the overall vistas do not vary throughout the year, the marine life does. Grey whales migrate along the coast and rest in the protected waters of Barkley and Clayoquot Sounds. Migration takes place from February to May with a peak in numbers during mid-April. Sometimes whales will stay from February to late October. Along the outer exposed islands within the Broken Group, resident sea lions can be found. Marine and shorebirds are common in this area, and various sites are known as breeding and nesting grounds. One example is the trumpeter swans which overwinters at the head of Alberni Inlet.

8.2.2.1 Facilities

There are four locations which provide facilities for marine sightseeing. In Port Alberni, the Lady Rose has daily trips to the Broken Group Islands, Ucluelet and Bamfield but no guide is provided to give a commentary of the area. The Lady Rose in the past has been chartered by private organizations for whale and bird watching tours.

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[3]Interviews with the Alberni Salmons Cahrter Association and Others.

In Tofino, the Safari 2 is available year round for sightseeing. Vessels from Vancouver have travelled to Tofino to set up whale watching tours during March and April. In Ucluelet, the Canadian Princess relies heavily on sightseeing as it is 60% of its business[4]. This spring, specialized packages were put together specifically for whale watching and the tours were full during March and April. Subtidal Adventures, which is also based in Ucluelet, relies on sightseeing for 75% of its business[5]. In Bamfield, Kingfisher Charters provide fishing and sightseeing trips within the Deer Group Islands. The Bamfield Marine Station offers weekend Adult Programmes on natural history and marine biology field trips.

Tours are usually a 4-hour trip with a visit to the sea lions and whales and if possible, a cruise through the islands with stop off at one of the islands. Commentaries on the topography and marine life are provided on all tours. Even though sightseeing is very popular, weather and availability of marine life are major constraints. These two factors are very unpredictable. This year was exceptional for whale watching tours. The weather was sunny and calm, and the whales came in close to shore. If whale watching traffic increases in popularity the whales may be affected. In California whale watching boats may have pushed the migration pattern of the whales further offshore[6].

Marine sightseeing is increasing in popularity and there appears to be opportunities for more sightseeing tours. However, the unpredictable weather and variable marine life must be taken into consideration. As well control over number of vessels and their procedures may be necessary to ensure that the resource itself is not destroyed.

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[4]Interview with owner and manager
[5]Interview with owners
[6]Interview with Chief Naturalist, Pacific Rim National Park

8.2.3 Touring

A large variety of boats use the region for touring, including power boats, sailboats, kayaks and canoes. The key destination is the Broken Group Islands followed by Barkley Sound and Clayoquot Sound. Facilities required by tourists touring the area are minimal. Most tourists will bring in their own food and/or collect fish and seafood. Good access points and numerous campsites are required. Many of the larger vessels enter the area from Victoria, however, others trailor boats to Port Alberni, Toquart Bay, Ucluelet, China Creek, Poett Nook and Bamfield. Boaters heading into Clayoquot Sound would probably launch their boats in Tofino. Smaller vessels such as aluminum boats, zodiacs, kayaks and canoes, need to launch their boats within a close proximity to the islands in order to cross in protected waters. In summer most campsites available to boaters are overcrowded. Larger vessels provide sleeping accommodation, however, they require protected bays for moorage. In the summer, good mooring spots of the Broken Group Islands are often crowded.

The Deer Group Islands on the other hand are not utilized by most touring vessels yet they offer excellent protected waters to explore the shoreline and many islands could provide campsites. Bamfield is very close and the islands are easily accessible. The Deer Group could be used as another destination for small craft touring.

8.2.4 Diving

Barkley Sound is known as one of the best diving locations in the world. Offshore currents, upwelling and unpolluted waters produce an underwater environment which is diverse and has abundant marine life. Popular spots are the current swept areas of the Broken Group Islands, subtidal reefs both inshore and offshore, and the 225 wrecks found in the area. Clayoquot Sound is accessed via Tofino, but is not utilized as much as Barkley Sound by divers.

Visibility determines the best times for diving. Spring through fall is the most popular diving period. In the winter, B.C.'s waters are clear and visibility up to 40 meters is common. However, in Barkley Sound, during the winter season, high winds and stormy weather is common. These factors often make access to the good sites very difficult.

8.2.4.1 Facilities

Most tourists wanting to dive in the region will usually use a dive charter boat. The best sites are accessed by boat and the charter owner has local knowledge of the best sites. Small groups of people may either shore dive or bring their own boats. Access to the islands is usually via Toquart Bay or Ucluelet.

Port Alberni - Alberni Divers Ltd.: a dive store with compressor and charter boat operation;
- Rendezvous Dive Ventures: a charter boat operation which picks up divers in Port Alberni and is based in Rainy Bay.

Bamfield - Kingfisher Charters provides air, accommodation, and dive boat, diving is secondary to fishing charters.

Ucluelet - Subtidal Adventures: a dive boat which works in conjunction with Pat's Camera and Sporting Goods (air station); diving is 25% of business.
- Canadian Princess at one time tried to promote diving and was unsuccessful; at present costs are too high and only 1 or 2 dive groups per year are accommodated.

Tofino - one air station; fishing charter operators will take out divers into Clayoquot Sound.

Vancouver - 2 dive boats - M.V. Skeena and Pacific Sea Ventures are based in Barkley Sound for the summer, divers are picked up in Ucuelet.

Only one charter business, Rendezvous Dive Ventures, deals exclusively with diving. This company is so successful that trips are booked 1-2 years in advance. Their market is Washington, B.C.,[7] Alberta and Saskatchewan. It took approximately 5 years to build a strong base of divers from which to draw. They provide inexpensive, rustic accommodation with good dive sites. Their future plans are to reduce their charters in the winter as stormy weather makes access to good sites either uncomfortable to the divers or not possible.

In order for a dive business to succeed it must be accepted by the dive community. Word of mouth is one of the most important methods of advertising. If dive charters were to tie in with stores in various cities they could increase their exposure considerably. Dive packages must also be inexpensive as the diving industry is small and the number of people who can afford luxurious trips is limited.

Consideration of the marine environment is important and conservation should be enforced, by the charter boat operators, to ensure that the marine life is there for all divers to see. As well, permanent moorings should also be considered by private enterprise. This could protect the marine life and wrecks from the constant dropping of anchors by the dive boats.

[7]Interview with Owners

9.0 MARKET ANALYSIS

The following section synthesizes market information derived from available reports, interviews, meetings and a survey conducted by our study team in the summer of 1983. This information, commencing with a 1974 study on the volume of travel to the Alberni-Clayoquot area, visitor profile and trip characteristics, together with current and historic market information, forms the basis for our projections. Subsection 1, below, outlines the main contribution and limitations of the available data sources.

9.1 DATA SOURCES AND LIMITATIONS

The main sources of secondary data related to the study area are discussed below and are also listed in a bibliography at the end of this section. Reference numbers, shown in parentheses in the following paragraphs, are keyed to the listing.

. Visitors '79 travel survey reports by B.C. Research, particularly: (1) Results for Tofino, Ucluelet and Other Areas on "Northern" Vancouver Island; (2) British Columbia Visitors Travel Survey - 1979; (3) All Visitors to British Columbia; and (4) Victoria:

Visitors '79 reports are the result of an extensive survey of visitors to British Columbia conducted during the period of May 18 to October 31, 1979. The large sample size (15,000 visitor parties which represents about one in every 150 visitor parties) allows a high degree of confidence in the reliability or representativeness of the data.

The Visitors '79 reports are a good source of data on tourism in B.C. The survey asked detailed questions about the visitors' trips including entry point, mode of transport, trip purpose, activities, accommodation, length of stay, expenditures, likes and dislikes, and visitor characteristics.

The major limitations of the survey, for our study purposes, are:

- only visitors who lived outside of B.C. were surveyed.
- surveyed visitors were required to have stayed at least one night in B.C., thereby eliminating the day visitors who represented about 23% of the total visitor market (source: Visitors '79 Results for Tofino, Ucluelet and Other Areas on "Northern" Vancouver Island, page A-3).
- the personal characteristics of visitors included only age and income.
- the data presented were not always area specific. For example, the activities and preferences reported for Port Alberni refer to the entire B.C. experience of those who stayed overnight in Port Alberni.
- detailed data for the Alberni-Clayoquot area were lacking.
- there was no trend analysis or comparison to past data in these reports except for B.C. as a whole.

. Canadian travel surveys: (5) British Columbia Resident Tourism Survey 1976, by B.C. Research; (6) Vacation Travel by Canadians in 1981, Volume 1 Analysis, by Traveldata International; (7) Report for B.C., Print Measurement Bureau Survey of Canadians - PMB-III, by Canadian Government Office of Tourism (1976-79); (8) Canadian Travel Survey - Canadians Travelling in Canada, 1979 and 1980, by Statistics Canada:

The B.C. Resident Tourism Survey was concerned only with B.C. residents whereas the other three studies considered the travel patterns of the entire Canadian population.

Although all four reports cover much the same topics as the Visitors '79 reports, the data presentations and classifications are often not directly comparable to Visitors '79 data. The Canadian tourist, the B.C. resident tourist, and the non-B.C. resident tourist were considered as separate, mutually exclusive, markets. In fact, there was some overlap in the data bases; that is, the non-B.C. resident could be Canadian or of foreign origin and the Canadian tourist

included B.C. residents.

The major limitation of these data sets was that they did not examine our study area. The focus was on British Columbia as a whole, or in the case of the B.C. Resident study, major tourism regions within the province.

The information is useful to the extent that it describes tourism in B.C. as a province and tourism on Vancouver Island. The information may also be useful in showing whether trends and patterns we have observed in the study area are common to the Island or the province.

. (9) Harbourfront Feasibility and Design Study for a Tourism Project in Port Alberni, by the Cumberland Group and Norman Hotson Architects:

This 1982 study included a survey of 116 visitors to the Port Alberni area. It highlighted some of the likes and dislikes of tourists and some trip characteristics. However, the sample size is small and the survey was conducted on only one day; thus the survey is not statistically representative of tourism in the region. It is, however, useful as a "control" data set and, more importantly, for visitors' impressions of the Port Alberni area.

. (10) Tourism Development for the Pacific Rim National Park, by AVG Management Science Ltd.:

This 1974 study included a market survey of visitors throughout the Tofino-Ucluelet-Bamfield area. Auto exit interviews with 500 visitors, National Park statistics, traffic counts and interviews with facility operators comprised the data base.

This source provided an historical perspective for the market analysis. It covered much the same topic areas as the Visitors '79 data but not in a comparable form. Therefore, it really cannot be used to establish trends.

. (11) Travel Industry Economic Status Report for Vancouver Island, B.C. Research, 1979,1982:

The tourism model indicated travel characteristics for British Columbia and its sub-regions. It described the economic status of the travel industry, highlighting not only the volume of travel but also travel-related expenditures and their direct impacts on the economy. The major limitation of this source is that it was a macro-analysis and thus did not specifically consider the Alberni-Clayoquot area. The analysis also did not include the day visitor market.

. (12) The Tourism Industry in Tofino and Ucluelet, by Ministry of Tourism, 1982:

This brief considered visitor characteristics based on the Visitor '79 statistics and thus provided little new information. The references to accommodation counts did not take into account all campgrounds. However, they included as visitors, work crews and other non-tourists staying in motels and hotels.

. (13) Accommodation Supply/Demand Analysis - Tofino, Ucluelet, Port Alberni, by Pannell Kerr Forster, 1979:

This study examined accommodation availability and occupancy in Port Alberni, Tofino, Ucluelet and Sproat Lake. The analysis focused on hotel and motel facilities and thus did not include campgrounds, trailer parks or cottages which are major types of accommodation found in the Pacific Rim area. Nevertheless, it provides some location-specific data that is useful in estimating total visitor counts.

. (14) Vancouver Island Regional Tourism Plan, by Marshall Macklin Monaghan Limited, 1980:

The report was oriented towards Vancouver Island as a whole rather than sub-regions of the Island. Some Alberni-Clayoquot area

information, such as facility inventories, was extracted from the report; but data regarding market characteristics were presented for Vancouver Island only. This was largely due to the report's reliance on previous studies such as the Visitors '79 survey results.

. (15) Park Visitor Statistics, 1981, 1982, by Pacific Rim National Park; (16) The West Coast Trail Unit, North Trailhead Information Centre Seasonal Report, 1981, by Pacific Rim National Park:

Data derived from these two sources related to Park visitors who are only one segment of the Alberni-Clayoquot visitor market. Park visitor statistics are neither representative of all visitors nor accurate because they were collected from a visitor registration book and camping registration cards. Only a small percentage of visitors sign the book and not all visitors camp overnight.

. (17) Visitor Survey based on the Alberni-Clayoquot Regional Tourism Strategy Questionnaire, by MacLaren Plansearch, July and August, 1983:

The survey was structured as an auto-exit survey but was not able to intercept tourists along the key exit corridor. Also, the survey was limited to 299 valid questionnaires. The tabulated results should not be regarded as statistically valid, but only as an analysis of the profile and characteristics of the particular respondents.

9.1.1 List of Secondary Sources:

(1) Results for Tofino, Ucluelet, and Other Areas on "Northern" Vancouver Island, B.C. Research, 1979

(2) British Columbia Visitors Travel Survey - 1979, B.C. Research

(3) All Visitors to British Columbia, B.C. Research, 1979

(4) Victoria, B.C. Research, 1979

(5) British Columbia Resident Tourism Survey 1976, B.C. Research

(6) Vacation Travel By Canadians in 1981, Volume 1 Analysis, Traveldata International

(7) Report for B.C., Print Measurement Bureau Survey of Canadians - PMB-III, Canadian Government Office of Tourism, 1979

(8) Canadian Travel Survey - Canadians Travelling in Canada, 1979 and 1980, Statistics Canada, 1981

(9) Harbourfront Feasibility and Design Study for a Tourism Project in Port Alberni, Cumberland Group and Norman Hotson Architects, 1982

(10) Tourism Development for the Pacific Rim National Park, AVG Management Science Limited, 1974

(11) Travel Industry Economic Status Report for Vancouver Island, B.C. Research, 1979, 1982

(12) The Tourism Industry in Tofino and Ucluelet, Ministry of Tourism, 1982

(13) Accommodation Supply/Demand Analysis - Port Alberni, Tofino/Ucluelet/Sproat Lake, Pannell Kerr Forster, 1979

(14) Vancouver Island Regional Tourism Plan, Marshall Macklin Monaghan Limited, Stevenson and Kellogg, L. J. D'Amore & Associates, August 1980

(15) Park Visitor Statistics, Pacific Rim National Park, 1981, 1982

(16) The West Coast Trail Unit, North Trailhead Information Centre Seasonal Report, 1981, Pacific Rim National Park

(17) Alberni-Clayoquot Regional Tourism Stratey Questionnaire, MacLaren Plansearch, July and August, 1983

9.2 VOLUME OF TRAVEL TO ALBERNI-CLAYOQUOT

The difficulty in determining the total number of visitors to the Alberni-Clayoquot area and even to Vancouver Island lies in the available sources and data collection methods. Each source has its own set of assumptions and parameters which limits its compatibility with other sources.

In 1979, Vancouver Island had 2.3 million Canadian visitors, about 22% of total Canadian visitors to British Columbia. Data for 1976 show that 1.3 million visitors came from within B.C. alone - 93% of whom came from Vancouver Island or from the Lower Mainland area.

Non-B.C. Resident Destinations on Vancouver Island, 1979

Destination	No. of Parties	Party Size	No. of Persons	% of Total*
Vancouver Island	403,600	3.0	1,214,800	100
Tofino/Ucluelet	17,600	2.7	47,700	4
Port Alberni	10,600	2.4	24,900	2
Campbell River	31,300	3.1	98,000	8
Nanaimo	31,400	2.4	75,700	6
Parksville Area	19,200	2.5	48,200	4
Duncan	16,700	2.3	38,200	3
Courtenay	9,300	3.0	27,900	2
Port Hardy	4,700	2.3	10,800	1
Hwy 4 Day Only	11,000	2.7	29,700	2
Victoria	23,800	3.1	1,013,500	83
			1,414,600	115

* Column does not add up to 100% due to multiple counting.

Source: Visitors '79, B.C. Research

The most complete visitor information for the Alberni-Clayoquot area is found in Visitors '79 reports. However, they refer only to overnight visitors who lived outside of British Columbia. They also indicate travel volume for the period of May to October rather than the entire year. Therefore visitor counts obtained from this source must be increased to include day visitors, B.C. residents and the trips made between November and April. On the other hand, the B.C. Tourism Model indicates yearly travel to Vancouver Island for both residents and non-residents. However, it too does not include the day visitor and, more importantly, is not available for the Alberni-Clayoquot area.

The B.C. Tourism Model indicated that in 1979 there were approximately 3.5 million visitors to Vancouver Island. It was estimated that 51% of the visitors were British Columbia residents, 18% were residents of other provinces and territories in Canada, and of the remaining 31% of visitors, 28% resided primarily in the United States.

1979 was a peak year for travel to Vancouver Island. The early 1980's saw fewer visitors but is expected to surpass 1979 levels by 1985. It is predicted that the increase will continue to at least 1986.

All Visitors To Vancouver Island

1977	3,267,000
1978	3,465,000
1979	3,501,000
1980	3,395,000
1981	3,388,000
1982	3,411,000
1983	3,373,000
1984	3,132,000 (est.)
1985	3,652,000 (est.)

Source: B.C. Tourism Model, Dec. 1982

An estimate of the annual number of visitors and visitor days to the Alberni-Clayoquot area based on existing data sources may be derived three ways:

. visitor and resident survey analysis
. accommodation supply and demand analysis
. vehicle count approach

9.2.1 Visitor and Resident Survey Analysis

		Visitors	Visitor Days
Out-of-Province Overnight Visitors			
May to October - Vancouver Island		1,214,800[1, 2]	
Study Area - Tofino/Ucluelet	47,700		
- Port Alberni	24,900		
	72,600		
To exclude visitors included in both communities (estimated)	5,000	67,600	
To adjust to full year (100/70 x 67,600)		96,600	
To estimate visitor days (average length of stay about 3.0 days)			289,800
B.C. Resident Overnight Visitors			
To estimate (51/49 x 96,600)		100,500	
To estimate visitor days (average length of stay about 2.7 days)			271,400
Day Visitors[3]			
To estimate [23/77 (96,600 + 100,500)]		58,900	58,900
TOTAL		256,000	620,100

[1] Visitors '79 gives the May-Oct. period as 70% of full year.
[2] Represents 49% of visitors to Vancouver Island.
[3] Visitor '79 estimates day visitors as 23% of out-of-province visitors. Same percentage assumed for B.C. resident overnight visitors.

9.2.2 Accommodation Supply and Demand Analysis

	Visitors	Visitor Days	Room Nights
Adjusted Room Nights Occupied [4]			
Port Alberni			55,745
Tofino			30,772
Ucluelet			12,428
Sproat Lake			484
Total (rounded)			99,429
To estimate number of person nights (1.75 persons per occupied room; it is assumed that one person night equals one visitor day)		174,000	
To estimate number of visitors	61,100		
Campgrounds, Trailer Parks			Site Nights
874 sites based on estimated season length, occupancy, persons per site and average length of stay	76,200	217,200	62,100
Visiting Friends and Relatives			
Estimate based on weighted average of VFR data and average LOS	56,900	162,200	
Day Visitors			
Estimate [23/77 x (61100 + 76200 + 56900)	58,000	58,000	
TOTAL	252,200	611,400	

[4] Based on Accommodation Supply/Demand Analysis - Port Alberni, Tofino/Ucluelet/Sproat Lake, Pannell Kerr Forster, 1979. Reduced by room nights of work crews and monthly and weekly guests.

9.2.3 Vehicle Count Approach

Parks Canada has been collecting vehicle counts for Pacific Rim National Park since 1972. The traffic counter is located west of the Park road intersection with Highway 4 and measures westbound traffic only. The vehicle counts include Park visitors, Park staff, commercial vehicles, other local traffic, and repeat visitors. To eliminate the impact of repeat and non-visitor vehicles, Parks Canada deducts 5,000 vehicles from each monthly count. The counts do not include vehicles proceeding east from Highway 4, or those stopping at Port Alberni. Conversion from number of vehicles to number of visitors is made by assuming an average of 3 persons per vehicle - a standard measure used by national parks.

The Cumberland Group and Norman Hotson Architects in their Harbourfront report for Port Alberni in September 1982 use the 1981 Park vehicle counts to estimate the number of persons travelling to or through Port Alberni. Their assumptions are not necessarily the same as ours or as Parks Canada (for example, the Park deducts 60,000 vehicles for year, or 180,000 persons, whereas the Harbourfront report deducts 122,200 vehicles which they estimate at 305,500 to 366,600 persons). The net result of their estimate of visitors to the study region is 280,000 to 340,000, not including commercial travellers.

IN SUMMARY THE FOLLOWING CONCLUSIONS MAY BE MADE:

	Visitor	Visitor Days	Comments
. Visitor and Resident Survey Analysis	256,000	620,100	-relates to 1979
. Accommodation Occupancy Analysis(1)	252,200	611,400	-relates to 1979 -does not include illegal campers, cottagers, and Bamfield
. Vehicle Count Approach(2)	280,000-340,000 persons		-relates to 1981 -does not include commercial travellers

In round numbers, we estimate that in 1979 about 250,000 persons visited the Alberni-Clayoquot area for a total of about 600,000 visitor days. Based on the Travel Industry Economic Status Report (B.C. Research) for Vancouver Island, prepared in September 1983, 1982 visitation was about 3% less than in 1979, and 1983 was about 4% less.

(1) The Harbourfront report (Cumberland Group and Norman Hotson Architects) using different assumptions estimated visitors for 1982 to be 385,000 to 413,000.

(2) The Cumberland Group and Norman Hotson Architects Harbourfront Report.

9.3 VISITOR PROFILE

The available data and results from our own survey provide information on five visitor characteristics: origin, age, income, party composition, and likes/dislikes.

9.3.1 Origin

The majority (just over 50%) of non-British Columbia visitors to the area are Canadians. The United States is the second largest market (40%), with most visitors originating in the west coast states, mainly Washington, California and, to a lesser extent, Oregon. The remaining 10% of the visitors are of international origin. In this group the United Kingdom and West Germany figure highly.

Origin of Non-British Columbia Visitors
by Selected Destinations, 1979

Place of Origin	Tofino & Ucluelet	Port Alberni	Hwy 4 Day Only	Victoria	Vancouver Island	B.C. Total
Alberta	24.5%	29.8%	26.4%	14.9%	18.2%	32.8%
Other Canada	26.2	20.4	32.8	15.3	16.3	14.4
TOTAL CANADA	50.7	50.2	59.2	30.2	34.5	47.2
Washington	14.5	15.8	3.5	18.8	17.9	17.6
California	10.4	11.6	5.9	21.5	19.9	11.2
Other U.S.A.	14.5	14.1	10.7	22.5	20.9	18.1
TOTAL U.S.A.	39.4	41.5	20.1	62.8	58.7	46.9
International	9.9	8.1	20.6	7.0	6.8	5.9

Source: Visitors '79, B.C. Research

Note that in terms of non-B.C. visitors to Vancouver Island, Americans are the primary market (59% vs. 35% Canadian) but a somewhat different pattern exists in the study area (50% Canadian vs. 40% U.S.). It would appear that American visitors are less aware of or interested in the Alberni-Clayoquot area than other areas of the Island. They are most attracted to Victoria, where 63% of visitors are Americans.

International, non-U.S. visitors to the Alberni-Clayoquot area represent less than 10% of the total overnight visitors but there is a marked increase to 20% when day visitors are considered. These visitors are interested in Vancouver Island and this interest goes beyond Victoria and therefore is a market worthy of consideration when planning attractions.

Vancouver Island is a destination chosen by 16% of all British Columbia travellers; it is a vacation area for 25% of B.C. pleasure-oriented travellers.

More than half (55%) of the B.C. resident travellers live in the Lower Mainland area. Approximately 18% live on the Island itself and the remaining 27% come from other parts of the province.

Establishing an historical trend is difficult due to differences in sampling procedure. However, the 1974 Pacific Rim National Park survey indicated that visitors to the Alberni-Clayoquot area were mainly of Canadian origin (84% to 88%). Most arrived from B.C.; Alberta and Ontario were second and third respectively. This figure, however, refers to Park campground registrations which may be a source of bias. That is, it may reflect a camping preference on the part of Canadians rather than a destination preference. It also suggests that the National Parks system is better known to Canadians than to non-Canadians.

The Pacific Rim National Park Visitor statistics for 1981 indicated a slightly lower percentage (76.9% as opposed to 1974's 84%-88%) of Canadian visitors. The detailed origin breakdown for park visitors is

listed below. It is a classification of the visitors who stopped at the information centre.

Pacific Rim National Park
Visitor Origin as a Percent of Total, 1981

Vancouver Island	30.7%
B.C. Lower Mainland	23.1
Other B.C.	5.4
Alberta	8.0
Other Provinces	9.7
Canada	76.9
Washington/Oregon	5.0
California	3.0
Other U.S.A.	4.7
U.S.A.	12.7
West Germany	6.9
Other Countries	4.0
Foreign	10.9

Source: The West Coast Trail Unit, North Trailhead Information Centre, Pacific Rim National Park, 1981

Our own survey results showed a similar breakdown of visitor origin. Among those interviewed Canadians were the largest market representing 77.9% of the total. The United States market represented 18.7% and the international visitor market only 3.3%. B.C. residents represented just over one-half of the respondents.

Origin of Visitors to the
Alberni-Clayoquot Area, 1983

Place of Origin	Tofino	Ucluelet	Port Alberni	Bamfield	Regional Total
Vancouver Island	14.1%	24.3%	21.6%	23.2%	20.1%
British Columbia	35.4	27.1	24.3	33.9	30.4
Other Canada	32.3	27.1	31.1	14.3	27.4
Total Canada	81.8%	78.5%	77.0%	71.4%	77.9%
United States	14.1	15.7	20.3	28.6	18.7
International	4.0	5.7	2.7	--	3.3

Source: MacLaren Plansearch, 1983

Distance clearly plays a large part in determining whether or not to vacation on Vancouver Island. The primary market area is geographically centred around western Canada and the western United States. Figure 6 shows the distances (driving time) from the major markets.

9.3.2 Age

Some 40% of non-resident visitors to B.C. are over 44 years old, and travel without children. (This is not very different than the profile of the 1982 Canadian traveller which shows 46% of all vacationers in Canada are over 40 years old.) The most noticeable under-represented groups are the teenagers (13 to 18 years) at 5.7% and young adults (19 to 24 years) at 10%.

Port Alberni seems to have a higher proportion of visitors over 35 years of age, especially in the over 55 category, than either Tofino and Ucluelet or Victoria. There are also few young people (under 24 years) visiting Port Alberni than the other two areas. There may be

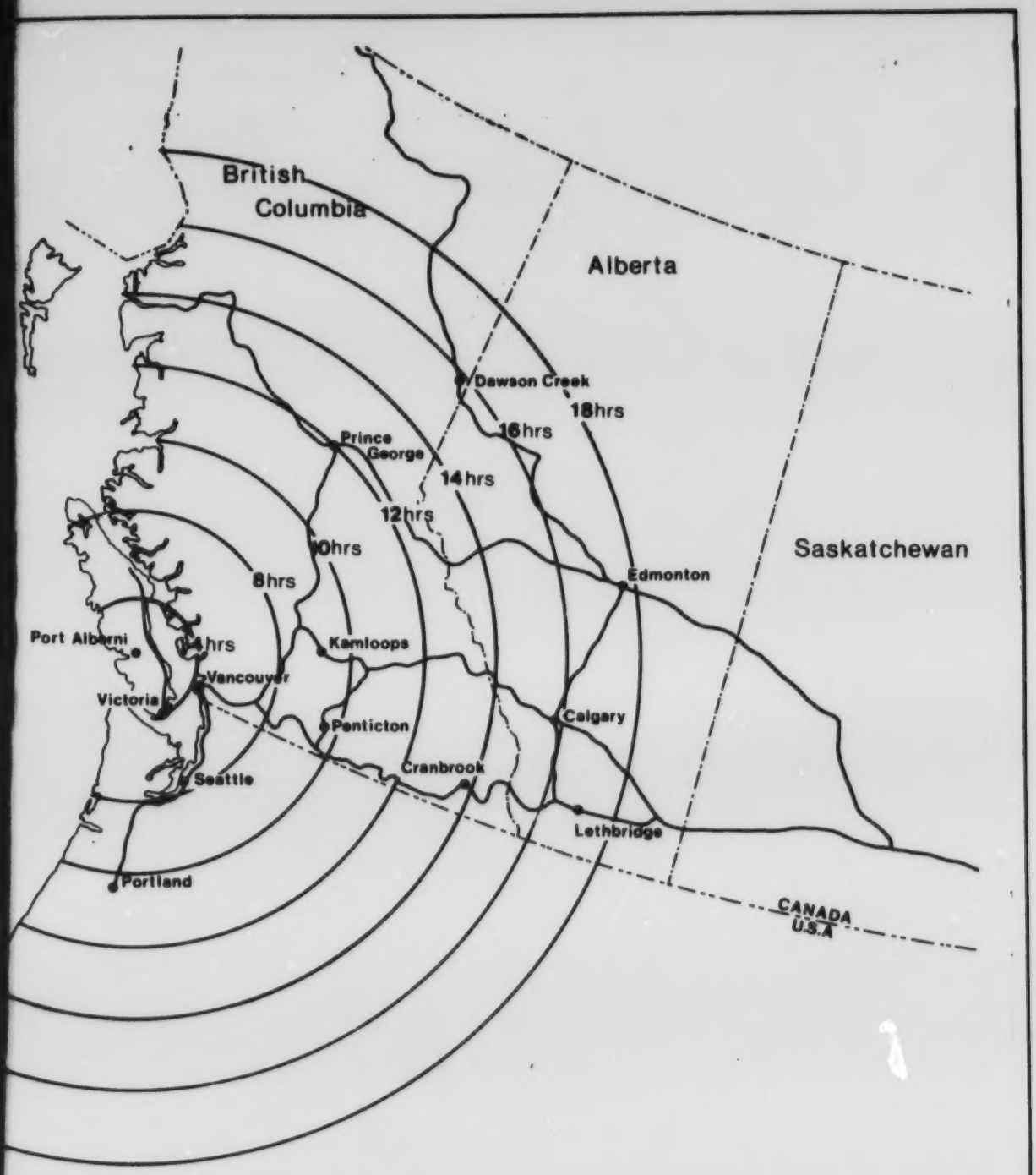

Figure 6

Driving Time from Major Markets

several reasons for these apparent differences. For example, Port Alberni is the third choice (after Tofino and Ucluelet) for accommodation; thus we can infer that the middle-aged and older visitor prefers more conventional types of accommodation (motels and hotels rather than camping) and stays at Port Alberni only if Tofino and Ucluelet have been fully booked. Also, the figures may be skewed as a result of the relatively higher number of persons visiting friends and relatives in Port Alberni.

Visitor Age Distribution

Years	Tofino & Ucluelet	Port Alberni	Victoria	Vancouver Island		B.C. Total
				Non-B.C. Residents	B.C. Residents	
Under 12	16.1%	13.1%	11.9%	10.6%		12.2%
13 to 18	1.8	4.8	2.9	5.8	) 29.0%	5.7
19 to 24	15.4	7.5	13.6	8.3	15.0	10.0
25 to 34	23.9	12.0	19.9	16.6	28.0	18.0
35 to 44	8.4	11.2	9.2	14.7	17.0	14.1
45 to 54	14.8	20.7	17.8	17.4		16.2
Over 55	19.5	30.7	22.7	22.7	) 11.0	23.8

Source: Visitors '79, B.C. Research; Vancouver Island Regional Tourism Plan (Draft), Marshall, Macklin, Monaghan Ltd., 1980.

Our survey results showed small variations in these patterns. Ucluelet attracted the 19 to 24 age group more than any other centre in the Alberni-Clayoquot area. However, the frequencies shown are those of the 299 persons sampled and may not be reliably representative of the total visitor population.

Visitor Age Distribution Alberni-Clayoquot, 1983

Age	Tofino	Ucluelet	Port Alberni	Bamfield	Regional Total
Under 12	24.7%	7.2%	21.8%	6.2%	17.2%
13 to 18	7.2	3.9	8.8	6.2	6.8
19 to 24	7.2	21.0	4.6	7.3	9.2
25 to 34	22.3	23.8	12.2	17.5	19.2
35 to 44	24.5	18.8	18.9	29.9	23.0
45 to 54	8.6	12.2	20.6	23.2	15.0
Over 55	5.3	13.3	13.0	9.7	9.6

Source: MacLaren Plansearch, 1983

The 1979 age distribution of the non-B.C. visitors is similar to that observed in the 1974 study of Pacific Rim National Park area. However, in 1974 there were relatively fewer teenagers and children, but more visitors in the 20 to 34 range (48%). The over 35 group accounted for 38% of the visitors.

Overall, there were only a few of the interviewed families who were travelling to the Alberni-Clayoquot area with young children and/or teenagers.

Teenagers, generally speaking, may not like travelling with parents because of differing interests. They may have a preference to organize their own trips and are old enough to stay at home without supervision. On the other hand, the larger numbers of young adults found in Pacific Rim National Park may be the result of their greater desire to stay in lower cost campgrounds and to participate in this kind of semi-wilderness experience.

Mature adults, which would include retired persons and "empty-nesters", are the main market for the area. The mature tourist is not a unique

phenomenon considering the general trend towards an aging society. It is also the population group with the most time and money to travel.

9.3.3 Income

The discussion of visitor income does not take into account the change in dollar value from 1974 to 1979; therefore, the change in income reflects inflation.

Under one-half of the non-resident visitors to the Alberni-Clayoquot area had a family income between $20,000 and $40,000 in 1979 dollars. The study area may attract a larger proportion of visitors with incomes below $10,000 than Vancouver Island. This is probably attributable to the lack of higher priced facilities in the study area.

1979 Visitor Family Income

Family Income	Tofino & Ucluelet	Port Alberni	Victoria	Vancouver Island		B.C. Total
				Non-B.C. Residents	B.C. Residents	
Under $10,000	15.9%	18.9%	7.9%	8.5%	13.0%	10.1%
$10 - $20,000	23.0	24.9	24.9	24.8	47.0	27.8
$20 - $30,000	23.8	23.5	31.4	31.6		30.1
$30 - $40,000	21.3	17.4	19.4	19.1		17.7
$20 - $40,000	45.1	40.9	50.8	50.7	40.0	47.8
$40 - $50,000	9.7	9.2	7.0	7.6		6.9
Over $50,000	6.3	6.1	9.3	8.5		7.4

Source: Visitors '79, B.C. Research; Vancouver Island Regional Tourism Plan (Draft), Marshall, Macklin, Monaghan Ltd., 1980.

Among those interviewed in the MacLaren Plansearch 1983 summer survey, Tofino attracted relatively more visitors in the over $40,000 income range. The majority of Port Alberni and Ucluelet visitors were in the $20-$40,000 income range. (Refer to the table below.)

Average income figures in 1974 for the Pacific Rim National Park and area indicate "high incomes" with an average of about $12,000. However, this may be skewed because of the large no response rate -- 20% of those surveyed did not respond to this sensitive question. The Pacific Rim study compared the incomes of those who stayed in conventional accommodation (hotels and motels) with those who stayed at campgrounds. Campgrounds appear to have attracted visitors at all income levels whereas the conventional accommodation tended to attract higher income visitors. This tendency is illustrated by the table below.

1983 Alberni-Clayoquot Visitor Income

Family Income	Tofino	Ucluelet	Port Alberni	Bamfield	Regional Total
No response	26.0%	1.4%	6.7%	28.4%	16.6%
Under $10,000	5.0	8.6	1.3	6.8	3.4
$10 - $20,000	7.0	25.7	13.3	4.1	8.2
$20 - $30,000	16.0	34.3	45.3	20.3	26.0
$30 - $40,000	18.0	17.1	30.7	17.6	24.5
$20 - $40,000	34.0	51.4	76.0	37.9	50.5
$40 - $50,000	14.0	12.9	2.7	4.1	9.7
Over $50,000	14.0	1.4	-	18.9	11.6

Source: MacLaren Plansearch, 1983

1974 Visitors to Pacific Rim Park and Area

Income Groups	Hotel/ Motel/Lodge	Campground
No response	19%	20%
Under $6,000	6	19
$ 6,000 - $ 9,000	7	15
$10,000 - $12,000	25	18
$13,000 - $15,000	10	14
Over $15,000	32	14
Average Income	$15,000	$11,200

Source: Tourism Development for the Pacific Rim National Park, AVG Management Science Ltd., 1974

These patterns of family income are reinforced by the economic profile of B.C. resident business and pleasure travellers. One-half of the business travellers had a family income over $15,000 (1976 dollars) and 49% of pleasure travellers reported family incomes over $12,000. A 1981 survey of Canadians showed that half of the travellers had a family income over $25,000.

9.3.4 Party Composition

Visitor parties consist mostly of adults. About 80% of the visitor parties surveyed were adult only, mostly involving one or two adults. Generally speaking, parties of more than four adults were virtually non-existent. These data support the observation that the primary market is the mature adult who tends to travel without children.

The 1974 Pacific Rim National Park data indicate the same pattern. However, it was noted in the survey report that larger families (i.e. three or more children) tend to visit the Park more than other places in the area.

B.C. Non-Resident Visitor Party Composition, 1979

Party Composition	Tofino & Ucluelet	Port Alberni	Victoria	Vancouver Island	B.C. Total
Children	20.8%	14.8%	23.0%	21.6%	23.1%
1 Adult	10.5	26.3	13.7	15.2	19.9
2 Adults	54.4	38.1	51.3	51.2	46.5
3 Adults	3.4	14.7	3.8	3.9	4.6
4 Adults	11.0	6.2	7.1	6.7	5.9
5 Adults +	0	0	1.2	1.4	0
Adults Only	79.2	85.2	77.0	78.4	76.9

Source: Visitors '79, B.C. Research

9.3.5 Likes/Dislikes

Based on the 1974 survey the "things" which visitors liked the most about the Pacific Rim National Park and area had to do with the scenery and atmosphere. Of all visitor likes, 25% referred to sightseeing. The peaceful nature of the area and the beach were each mentioned by 22% and the ocean by 12%.

Visitor dislikes focused on facilities (poor toilets), crowds, and poor weather. Overnight campers showed a greater dislike for facilities and weather than the conventional accommodation users, likely due to their closer association with these elements. It is not surprising that camping visitors suggested that sanitary facilities be improved and that there should be more campsites and development in general.

Impressions of Port Alberni (1982) were very much the same as for the Park in 1974. Visitors found the area to be "pretty/ charming/quaint/a nice place." However, they did not feel there was anything memorable in the area; "it was not interesting enough to stay/nothing to attract tourists/no tourist facilities." Visitors did remember a negative image of the industrial nature of the city - the smoke stacks, smell

from the mill - and they were not interested in seeing a lumber industry town. Those travellers who had passed through Port Alberni without stopping or had never been there at all, generally had no impression to report. Their image was that of a place to pass through on the way to somewhere else; not a place to stop and see.

Comments elicited from 1983 visitors identified the climate, isolation, nature, scenery and beaches as being the most positive aspects of the region. Camping, hiking, boating and fishing activities were also mentioned. Visitors found too few tourist factilities in the area, thought that the existing ones were too expensive and disliked the appearance of both Tofino and Ucluelet.

9.4 TRIP CHARACTERISTICS

Seven major trip characteristics are considered: entry point, mode of transport, trip purpose, activities (most important and all types), accommodation, length of stay, and trip expenditures.

9.4.1 Entry Point

The single most common entry point into British Columbia and the study area is the Lower Mainland. However, most non-B.C. resident visitors to Tofino and Ucluelet enter British Columbia via the Trans-Canada Highway or other highway routes.

Entry to the Alberni-Clayoquot area via Vancouver Island primarily by ferry ranks fourth. This means that visitors first entered B.C. at other entry points, not that they did not use the ferry to get to the Island. The visitors who entered the study area via Vancouver Island represent mainly American visitors who arrived by ferry from the state of Washington.

Non-B.C. Resident Visitor
Entry Point into British Columbia, 1979

Entry Point	Tofino & Ucluelet	Port Alberni	Hwy 4 Day Only	Vancouver Island	B.C. Total
Vancouver Is.	14.3%	12.9%	12.4%	30.6%	7.1%
Lower Mainland	29.8	43.5	36.0	39.1	40.9
Southern B.C.	2.4	2.3	5.1	2.0	7.3
Trans-Canada Hwy.	24.4	20.9	25.4	14.7	17.8
Other E-W Hwys.	29.1	20.4	21.0	12.5	23.6
Other	0	0	0	1.0	2.4

Source: Visitors '79, B.C. Research

9.4.2 Mode of Transport

This is one trip characteristic which does not seem to change with time, data source, or type of traveller. The overwhelming majority of visitors prefer to use private motor vehicle (automobile and recreational vehicle) above all other forms of transportation, while air is the most common alternative.

Day visitors along Hwy 4 and visitors to Tofino and Ucluelet tend to travel in recreational vehicles more than visitors to other areas. This is likely due to the camping/outdoor activities that are more prevalent there.

The higher percentage of aircraft users among day visitors is due to the international travellers this area attracts. Also included in this group would be the Canadian and American "long-distance" travellers preferring aircraft as a mode of transport. Those arriving by aircraft would be the most likely users of organized tours because they are less likely to have a private vehicle for transportation upon arriving in B.C., although some may rent a vehicle.

Visitor Mode of Transport, 1979

Mode of Transport	Tofino & Ucluelet	Port Alberni	Hwy 4 Day Only	Vancouver Island	B.C. TOTAL
Automobile	55.4%	60.2%	51.9%	59.9%	59.6%
Rec. Vehicle	25.5	14.6	19.7	10.4	14.6
Bus	1.1	2.9	1.8	3.0	2.3
Train	0	1.7	0	1.4	1.3
Aircraft	15.5	20.7	26.7	21.9	18.9
Other	2.3	0	0	2.4	.9

Source: Visitors '79, B.C.Research

Our 1983 summer auto-exit survey interviewed visitors travelling primarily in private cars/vans and motorhomes/ campers. However, respondents indicated that besides these two types of vehicles, boats

Visitor Mode of Transportation
Used in Alberni-Clayoquot, 1983

Mode of Transportation	Tofino	Ucluelet	Port Alberni	Bamfield	Total
Private Car	58.2%	61.4%	43.2%	10.6%	46.5%
Rental Car	4.1	15.7	2.7	-	5.7
Taxi/City Bus	-	-	-	1.8	0.3
Intercity Bus	-	-	2.7	-	0.7
Rec. Vehicle	8.2	11.4	45.9	1.8	17.2
Boat	25.5	2.9	-	85.5	24.9
Other	4.1	8.6	5.4	-	4.7

Source: MacLaren Plansearch, 1983

were a major transportation mode used within the Alberni-Clayoquot region. In fact, the boat was the primary mode of transport for 86% of the surveyed Bamfield visitors. The power boat and, to a much lesser extent, the sailboat were the recreational equipment most frequently brought into the region.

9.4.3 Trip Purpose

The main purpose of trip is related to the relative abundance of recreational activities in the Alberni-Clayoquot area. Pleasure-oriented trips were the main reason to visit the area for 96% of Tofino & Ucluelet visitors and 90% of Port Alberni visitors. (source: Visitors '79, B.C. Research) Port Alberni is the destination for more business-related trips than Tofino & Ucluelet because it is a larger centre and has an industrial rather than a recreational orientation. Trips to Vancouver Island for business, meetings and conferences would be primarily concentrated in Victoria. Even among B.C. residents, the trip purpose is pleasure for 81% of visitors (source: Vancouver Island Regional Tourism Plan, Draft, Marshall Macklin Monaghan, 1980, page 104).

9.4.4 Most Important Activity

This information is closely linked to the main reason for visiting British Columbia. Its interpretation is limited because it does not consider the study area as an entity separate from the rest of British Columbia. In other words, we are looking at the most important activity for the entire trip to B.C. rather than for the duration of the trip in Port Alberni and Tofino & Ucluelet.

The most important activity, overall, is sightseeing. Visiting friends and relatives is the second most important reason for travelling to B.C. Visitors to the Port Alberni area seem to put equal emphasis on visiting friends and relatives and sightseeing whereas the Tofino & Ulcuelet area draws more of the outdoor-oriented tourist market.

Non-B.C. Residents Most Important Activity
While in British Columbia, 1979

Activity	Tofino & Ucluelet	Port Alberni	Victoria	Vancouver Island	B.C. Total
Visit F & R	16.7%	36.5%	21.3%	26.0%	28.4%
Business	3.4	14.6	5.8	6.5	12.4
Shopping	0	0	4.1	4.0	3.8
Passing Through	8.6	5.3	5.3	10.6	5.0
Sightseeing	54.9	35.9	50.4	44.3	25.6
Swimming	1.5	0	.4	3.3	.4
Festival/Events	0	0	6.1	5.1	3.4
Camping	7.5	2.5	1.3	2.0	3.6
Boating	2.7	0	.8	1.2	1.1
Fishing	1.5	5.3	1.9	3.4	3.6
Other	3.2	0	2.7	2.5	4.1

Source: Visitors '79, B.C. Research

About 10% of the visitors entering B.C. indicated that passing through was the most important activity. About 8.6% of the Tofino & Ucluelet visitors reported the same thing. This is difficult to interpret since it is at the end of the line and a special trip is made to get there.

9.4.5 All Activities

The 1974 study of Pacific Rim National Park and area visitors indicates that the majority of visitors were involved in driving, which can probably be interpreted as sightseeing. Walking was the second most popular activity, including both nature walks and hiking. Water related activities were also important to Park visitors. When asked to outline which activities they wanted to participate in to a greater extent, water related activities, such as swimming, fishing, water sports and beach activities, were the first choice. Walking type

activities were the second choice. In terms of activities not participated in but high on the "wanted to do it" list, visitors again listed water related activities. Horseback riding was also frequently cited. Visitors indicated that they did not participate in the various activities mainly because of the lack of time, the weather, lack of facilites or equipment, and because the water was too cold.

Activities Which Non-B.C. Residents
Participated in While in British Columbia, 1979

Activities	Tofino & Ucluelet	Port Alberni	Victoria	Vancouver Island
	--- Relative Rates of Participation ----			
Business	2.0%	5.4%	2.4%	2.8%
Passing Through	6.7	6.6	4.9	5.9
Passive:				
Visiting F & R	9.9	16.4	8.5	12.1
Shopping	10.8	11.1	13.8	15.6
Sightseeing	19.4	22.0	35.7	24.0
Fest. & Events	12.6	11.4	16.8	15.7
Passive Total:	52.7	60.9	74.8	67.4
Physical:				
Swimming	7.9	4.4	4.1	5.0
Camping	12.8	5.1	4.5	5.9
Boating	3.8	3.8	2.7	3.4
Fishing	3.1	8.3	2.1	3.9
Physical Total:	27.6	21.6	13.4	18.2
Other	11.1	5.5	4.6	5.7

Source: Visitors '79, B.C. Research

The 1982 survey of visitors to Port Alberni shows much the same type of pattern but with less emphasis on water related activities. Sightseeing was the number one activity followed by hiking, outdoor camping, fishing, visiting and shopping.

The 1979 survey provided the greatest detail regarding activity participation but again the information refers to the entire B.C. trip experience. However, it provides a useful means of generalizing the activities sought by visitors to the Alberni-Clayquot area.

Tofino & Ucluelet have relatively more visitors who participate in physical activities than Port Alberni, Victoria and Vancouver Island. Most of the visitors in this category participate in camping and swimming. Passive activities are not as prominent as in other areas but still represent the major type of activity. Port Alberni shows a higher concentration of sightseers than Tofino & Ucluelet but fewer than that of Victoria and the total Island. Physical activities are important here too, fishing being the most popular of all.

9.4.6 Accommodation

The majority of visitors (57%) to Tofino and Ucluelet use campgrounds and parks for overnight stays. Hotels and motels are used by 31% of visitors. The definite preference for a camping or wilderness experience is mostly due to the presence of Pacific Rim National Park. Resorts and lodges, which also have a high degree of association with the wilderness, would appear not to be popular according to Visitors '79 statistics. However, this is not the case as the study area does not have many units of this type; occupancy levels show that resorts operate near capacity during the height of the tourist season.

Unlike visitors to Tofino and Ucluelet, a high percentage of visitors to Port Alberni stay in private dwellings, no doubt a result of visiting friends and relatives. Port Alberni visitors also tend to use motel, hotel and camping accommodation, although campgrounds are not used as much as in Tofino and Ucluelet. Again, availability of supply

is an important factor in determining these results.

Accommodation Chosen by Non-B.C. Residents, 1979

Type of Accommodation	Tofino & Ucluelet	Port Alberni	Victoria	Vancouver Island	B.C. Total
Hotel	2.4%	1.3%	21.3%	18.5%	15.5%
Motels	28.4	33.0	38.7	35.4	29.9
Resorts/Lodges	.7	0	.2	.3	.5
Friends/Relatives	4.7	37.9	17.6	21.4	21.5
Cottage	4.0	0	.8	1.3	1.6
Campgrounds/Parks	57.0	27.9	20.0	21.4	29.3
Other	2.8	0	1.4	1.7	1.7

Source: Visitors '79, B.C. Research

The 1974 Pacific Rim National Park study examined accommodation by extent of visitor use. That is, it tried to determine whether visitors used more than one type of accommodation during their trip. The results show that there was little change in the type of accommodation used; visitors chose one type and used it exclusively. There was a slight tendency towards combining camping (campers, trailers, tents) with other types of accommodation, presumably motels.

Of all British Columbia resident visitors to Vancouver Island, 57% stay with friends and relatives (1976). Only 19% used a hotel or motel, and 8% camped. As would be expected, staying with friends and relatives tends to be more prevalent among pleasure travellers than business travellers. Approximately 54% of pleasure travellers use this type of accommodation compared to 39% of the business travellers. Business travellers prefer conventional accommodation: 23% used hotels and 17% used motels.

9.4.7 Length of Stay

The average length of stay in Port Alberni is identical to that of Vancouver Island as a whole: about 3.7 days. Length of stay of visitors to Tofino and Ucluelet is a little shorter at 3.1 days (this average has not changed since 1974). Although Port Alberni is not as attractive to tourists as the Tofino and Ucluelet area, visitors seem to stay longer there. This may be due to their main activity of visiting friends and relatives and also their tendency to use friends' and relatives' homes for overnight stays.

The average length of stay for B.C. residents travelliny to Vancouver Island is 3.3 nights. Business-oriented travellers tend to stay lonyer (4.6 nights) than pleasure travellers (3.9 nights).

Visitor Average Lenyth of Stay
(in nights)

1979	LOS	1976	LOS
Non-B.C. Residents:		**B.C. Residents:**	
Tofino and Ucluelet	2.8	Vancouver Island:	
Port Alberni	3.5	All B.C. Residents	3.3
Victoria	3.1	Pleasure Travellers	3.9
Vancouver Island	3.6	Business Travellers	4.6

Source: Visitors '79, B.C. Research; British Columbia Resident Tourism Survey 1976, B.C. Research

9.4.8 Trip Expenditures

Trip expenditures refer to all purchases made and expenses incurred during the trip excluding trip preparation. Visitors to the Alberni-Clayoquot area in 1979 generally spent less per party than visitors to Victoria and Vancouver Island as a whole, although per person expenditures in

Tofino and Ucluelet are similar to Victoria and the Island. The differences are attributable to different party sizes.

Tofino and Ucluelet visitors tend to spend more (both per party and per person) than Port Alberni and Hwy 4 day visitors. The difference is largely due to the category "other expenditures". Other expenditures, which includes major purchases (e.g. paintings) is not explained in the study report. In Tofino and Ucluelet this expense accounts for 30% of total party purchases whereas with visitors to Port Alberni and Hwy 4 day visitors it represents less than 3% of total daily spending per party.

Non-B.C. Resident Average Trip Expenditures
By Type of Expense, 1979

Trip Expense	Tofino & Ucluelet	Port Alberni	Hwy 4 Day Only	Victoria	Vancouver Island
Party per day	$25.92	$18.33	$17.41	$29.89	$27.49
Person per day	9.56	7.80	6.45	9.55	9.13
Accommodation	3.76	3.58	0	6.87	5.90
Meals/Refresh.	4.02	4.89	4.64	7.62	6.74
Food/Beverages	2.75	2.60	2.44	1.41	1.66
Auto Transport.	3.55	2.32	4.61	2.44	2.52
Other Transport.	1.42	1.20	1.50	2.41	2.20
Rec. & Enter.	.74	1.23	1.45	2.58	2.18
Shop. & Mementos	1.72	2.14	2.40	5.24	4.21
Other Expend.	7.96	.37	.37	1.66	2.45

Source: Visitors '79, B.C. Research

The 1974 Pacific Rim Park Study indicated average expenditures per party per day to be approximately $14.00, or about $4.12 per person.

This amount includes trip preparation costs which are less than one per cent of the total. The 1974 results together with inflation factors tend to confirm the 1979 data.

Food costs are generally the largest expense for both 1974 and 1979 (this does not take into account the large "other expenditures" in Tofino and Ucluelet in 1979). In 1974 accommodation ranked second and transportation third. However, in 1979 this was reversed due to the large increase in gas and oil prices at that time.

The British Columbia Resident Tourism Survey shows expenditures made by B.C. resident visitors to Vancouver Island in 1976 are similar to 1979 data. The average total expenditure per person per night was $21.51. Average expenditures per person per day for pleasure trips were significantly lower than for business trips ($19.30 vs. $43.17). Business travellers spent much more for meals, transportation and accommodation than did pleasure travellers.

9.5 SEASONALITY

Travel in British Columbia and Vancouver Island follows the general seasonal pattern for all of Canada although the differences between peak and slack periods are moderated. That is, Canada's summer season peaks at 50%, B.C. peaks at 41% and Vancouver Island is lower still at 34%. Conversely, during the slack winter months Vancouver Island has proportionately more visitors than B.C. which has more than Canada (18%, 14%, 11%, respectively).

The following table indicates little seasonal variation in the pattern of visits by origin of the visitor although U.S. and foreign visitors to Vancouver Island visit relatively more during the summer months.

1982 Seasonal Distribution of Visitors

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
CANADA	11%	20%	50%	19%
British Columbia:				
Canadian	16%	26%	39%	18%
U.S.A.	13	23	44	19
Foreign	9	29	47	13
Visitor Total	13	26	44	16
B.C. Residents	16	26	39	18
TOTAL BRITISH COLUMBIA	14%	26%	41%	17%
Vancouver Island:				
Canadian	19%	26%	32%	21%
U.S.A.	19	19	39	23
Foreign	17	22	41	19
Visitor Total	19	22	37	22
B.C. Residents	18	31	31	19
TOTAL VANCOUVER ISLAND	18%	26%	34%	21%

Source: B.C. Tourism Model, B.C. Research

9.6 HIGHLIGHTS OF THE CURRENT MARKET

The following charts highlight the major market segments that were previously described in the visitor profile and trip characteristics sections. They interpret all the data sources that were available, including our observations and interviews. Their purpose is to

describe the current market and the potential growth markets.

9.6.1 Interpretation of the Charts

Market segments are outlined according to vistor characteristics (origin, age, party composition and income) and trip characteristics (main mode of transport, purpose, accommodation and activities). These are the most meaningful segments based on the available data.

Each market segment is rated in importance relative to the subject category. The scale shown on the chart is A, B, and C. "A" refers to a major market segment; "B" an intermediate segment; and "C" a minor one. Supporting statistical information is contained in the above tables.

In addition to rating each segments's relative importance, the main growth opportunities are also indicated. These represent the markets which may grow and become more important to the study area. They were selected according to general tourism trends, markets deemed desirable for the Alberni-Clayoquot area and perceived deficiencies in the study area.

9.7 OVERVIEW

The natural grandeur of the region - the ocean and islands and beaches, the enormous trees, the lakes and mountains - is the region's greatest appeal.

The tourism appeal of the region focuses on Pacific Rim National Park which captures and interprets the natural qualities of the area. As one of only 28 national parks in Canada and as the only one on B.C.'s west coast, the Park has increased awareness of the region as well as its appeal to many market segments.

To a large extent the demonstration of demand for an area requires the area to have the supply components to satisfy the demand. It cannot simply be assumed that the accommodations, attractions and services that happen to be in place at a given time are an accurate test of the area's tourism appeal. It follows, therefore, that historical data may not contain all the information that is needed to reveal future market opportunities. Likewise, demand can be deflected by the attitudes, policies and actions of local residents. This factor is particularly relevant in a strategy study in interpreting the statistical data.

As an area of outstanding natural qualities, it is not surprising that Alberni-Clayoquot has a broad base of demand and, in our view, potential for an even broader base of future demand.

All age groups, except teenagers, are drawn to the area. The area's appeal to teenagers is largely a function of the range of active recreational opportunities; but it is likely, particularly on the peninsula, that many of the activities teenagers want may not be sufficiently compatible with the resource base, ambience and local objectives.

The emphasis on passive recreation favours adults travelling in pairs and also families with small children. Special interest activities would increase the appeal to larger adult groups and to more families

with teenagers. However, we see the main categories of party composition remaining as they are.

The income ranges attracted are skewed towards lower income levels. This is an example of demand following supply, particularly in the accommodation component which at present is of relatively lower quality and price. The affluent market which is currently in the minor category, holds potential for significant growth.

In terms of origin, the major markets are close to home. There is a direct correlation between expressed demand and distance. The high cost of travel, the travel time involved, the decline in awareness of the study area as distance from it increases, the lack of higher quality accommodation, the competitive choices that increase with the radius of travel, all favour the nearer markets. In Canada, these are Vancouver Island, the Lower Mainland and Alberta. In the United States, they are the coastal states.

Only about 6% of overnight non-resident visitors to Vancouver Island come to the study area. This means that about 94% (over 1,000,000 persons) are on Vancouver Island but do not visit Alberni-Clayoquot. There is probably a similar number of mainland B.C. resident visitors to the Island who do not visit this area. These segments represent a large market of persons who are relatively close at hand and who have already incurred the time and cost to reach the Island - in total a 2,000,000 plus target market.

Data on travel mode present some difficulty in interpretation. The Visitors'79 questionnaire asked, "What was your principal mode of transportation in B.C.?" The analysis, however, generally refers to "arrival by" particular travel modes into B.C. However, it is clear that the Alberni-Clayoquot area is dependent on automobile and recreational vehicle traffic.

The purpose of trip, in keeping with the emphasis on natural features, is mainly for pleasure. However, the peninsula area also offers a

favourable setting for corporate meetings which is not reflected in visitor data because the required supply components (meeting, accommodation and dining facilities) are not in place.

The accommodation used reflects the accommodation available. But persons over a wide range of income categories and persons wishing to experience the natural features of the area in different ways would support various types and levels of accommodation facilities.

The visitors of friends and relatives are an important sector in Port Alberni; their support of the attractions of the study area depend a great deal on the attitudes, interests and perceptions of the local people they are visiting.

The visitors' main activities reinforce the interpretation that emphasis is placed on the natural features and environment - sightseeing, beachcombing, camping, nature interpretation, boating, fishing, hiking. One message that market information is conveying to the strategy study is clear - to preserve and enhance the natural advantages that the area has to offer. Any development which seeks to increase access to and enjoyment of these qualities must not, in the process, destroy them.

TABLE 8

ALBERNI-CLAYOQUOT TOURISM DEVELOPMENT STRATEGY
VISITOR PROFILE HIGHLIGHTS
Relative Importance and Opportunities for Growth

Market Segments	Relative Importance A	B	C	Main Growth Opportunities	Comments
ORIGIN					
Vancouver Island	*			**	. Major markets are close to home.
B.C. Lower Mainland	*			**	. Albertans represent over half of the Canadian non-resident overnight visitors to B.C.
Other Canadians		*			. The main appeal to U.S. visitors is in the coastal states: Washington, California and Oregon.
United States	*			**	. Not a main destination for international visitors who tend to be day visitors on sightseeing excursions.
International			*		
AGE					
Under 18		*		**	. The under 18 segment is mainly comprised of children under 12. This reflects the family market and the lack of appeal of the area to teenagers.
18 to 24			*		
25 to 34		*		**	. Port Alberni attracts the over 35 groups, particularly the over 54-age group. The peninsula attracts younger visitors due to appeal of camping and outdoor activities. However, destination preferences are due also to available accommodation and visitor's income levels.
35 to 54	*			**	
Over 54		*		**	
					. Younger visitors travel shorter distances -tend to be B.C. residents. "Empty-nesters" and retired persons travel greater distances.

TABLE 8

ALBERNI-CLAYOQUOT TOURISM DEVELOPMENT STRATEGY
VISITOR PROFILE HIGHLIGHTS
Relative Importance and Opportunities for Growth

Market Segments	Relative Importance			Main Growth Opportunities	Comments
	A	B	C		
PARTY COMPOSITION					
One Adult			*		. Primary market segment is two adults travelling without children. . There is a proportionately higher draw of the family market from B.C. than from out of province. . Adults travelling alone originate mainly in B.C.
Several Adults	*			**	
Adults and Children		*		**	
INCOME (1979$)					
Under $20,000	*				. There is a large proportion of lower income visitors. This is due in part to lack of higher priced facilities in the area. . Campground accommodation appears to attract all income levels; hotel/motel users are in in the middle and upper income categories. . Visitors originating from outside B.C. tend to be in the higher income categories to a much greater extent than B.C. residents.
$20,000 to $30,000		*			
$30,000 to $40,000		*		**	
Over $40,000			*	**	

TABLE 8

ALBERNI-CLAYOQUOT TOURISM DEVELOPMENT STRATEGY
TRIP CHARACTERISTIC HIGHLIGHTS
Relative Importance and Opportunities for Growth

Market Segments	Relative Importance			Main Growth Opportunities	Comments
	A	B	C		
MAIN MODE OF TRANSPORT					
Automobile	*			**	. The available data do not provide information on mode of arrival into the study area. Nevertheless it is clear that "rubber tire traffic" is the main mode of visitor travel.
Recreational Vehicle		*		**	
Bus			*	**	
Train			*		
Other			*		
PURPOSE OF TRIP					
Business			*	**	. This is a vacation area and retreat. . Business-related trips are few. . Port Alberni attracts relatively more business trips due to size and its character as a more industrial centre. . Business travellers originate in B.C. . The study area does not attract the meetings market; however, it is currently lacking in meeting facilities on the peninsula.
Pleasure	*			**	
Personal			*		

TABLE 8

ALBERNI-CLAYOQUOT TOURISM DEVELOPMENT STRATEGY
TRIP CHARACTERISTIC HIGHLIGHTS
Relative Importance and Opportunities for Growth

Market Segments	Relative Importance			Main Growth Opportunities	Comments
	A	B	C		
ACCOMMODATION					
Hotel/Motel/Lodge	*			**	. Accommodation chosen is controlled to a large extent by the facilities available.
Campgrounds	*			**	. Port Alberni market: stay with friends and relatives and hotels/motels. Low occupancy throughout most of year including summer.
Friends and Relatives	*				. Tofino-Ucluelet area attracts campers, cottagers, hotel/motel/resort users.
Other			*	**	. Resort accommodation in Tofino is fully booked during summer season.
					. In the summer season the Tofino resorts generally fill up first, then other Tofino facilities, then Ucluelet motel/hotels, then Port Alberni accommodation.
					. Generally, non-B.C. residents choose campgrounds to a greater extent.
					. No hostel facilities are available in the area, and few bed-and-breakfast.

9.8 GLOBAL TOURISM MARKET TRENDS

Tourism trends in North America, with a specific emphasis on Canada and British Columbia can be found in a variety of sources including literature on recreation and tourism, long range economic projections, data on shifting social attitudes, etc. These trends are frequently outlined in various issues of the Journal of Leisure Research, The Travel Research Association (TTRA), as well as British Columbia Tourism Development Strategy and the most recent 1983 Outlook for Travel and Tourism from the 1983 Travel Outlook Forum (TTRA). A list of those trends that will affect the market segment of Alberni-Clayoquot region include:

Economic Trends

- Despite the recent economic recession, vacations are still considered a major part of North America life and while travel growth is expected to remain more or less stable this year, 1985 should be a year of renewed growth in the travel industry.

- People will adjust to decreased discretionary income by taking more weekend trips (mini-vacations) rather than a long vacation and more trips will be taken close to home.

- Increased interest in "value for dollar" vacations as travellers become more cost conscious.

- Business/Convention travel already appears to be on an upward trend phase and this may be a leading indicator of the coming recovery in the travel industry.

- There will be increased competition between tourism destination regions and between tourist operations.

TABLE 8

ALBERNI-CLAYOQUOT TOURISM DEVELOPMENT STRATEGY
TRIP CHARACTERISTIC HIGHLIGHTS
Relative Importance and Opportunities for Growth

Market Segments	Relative Importance			Main Growth Opportunities	Comments
	A	B	C		
ACTIVITIES					
Passive:					
Visiting Friends and Relatives		*			• Sightseeing is the most popular activity followed by camping and beachcombing.
Sightseeing	*			**	• Visitors tend to participate in passive activities more than physically-oriented activities; this may be partially due to inclement weather and lack of opportunities for active recreation.
Shopping			*	**	
Festivals and Events			*	**	
Beachcombing	*				
Nature Interpretation		*		**	
Boat Tours			*	**	• Many visitors bring their own boating equipment.
Active:					• Passive activities reinforce concept of study area as a "quiet, peaceful, scenic" vacation spot.
Camping	*			**	
Boating		*		**	
Fishing		*			• The low relative importance of shopping reflects the limited opportunities for tourist spending; however, the available data may not reflect the current level of shopping opportunities. In B.C. overall, shopping is a major activity.
Swimming			*	**	
Scuba Diving			*		
Golf			*	**	
Hiking		*		**	
Business/Meetings			*	**	
Other			*		

- Unemployment levels in the American Pacific Northwest and parts of Alberta will remain high and have a continued retarding force on a rebounding B.C. tourism industry.

- The devalued Canadian dollar will continue to have a positive impact on American visitation to Canada, however, its impact should not be overestimated due to the relatively high Canadian Tourism Price Index.

- Moderate income increases balanced by continued high unemployment suggest that the real spending power of Canadian households will experience minimal increases.

Social and Attitudinal Trends

- Emphasis on self-fulfillment is increasing.

- Continued erosion of the Protestant work ethic with a growing interest on those tourism activities that allow participation, self-improvement and self-fulfilling experience and promote education.

- Improved education levels will necessitate providing more sophisticated tourism activities (i.e. natural interpretation).

- Less emphasis on thrill oriented activities is expected.

- Vacations will more frequently be viewed as a necessity rather than a luxury.

- Increased segmentation within the market place with the need to appeal to many market segments.

- Growing "pent up demand" by consumers who have been "banking" their vacation time and dollars over the past five years.

- The single long vacation will continue to be replaced by more frequent shorter trips.

- Increase in package travel including mini vacations, special interest market segments, senior citizens, etc.

- More discriminating, more demanding and more sophisticated travellers who consider "value-for-money".

- Increased demand for better service and higher quality products.

- Changing role of women will have an increasing impact on travel plans due to increased available travel dollars, more separate holidays and increased single parent travel.

- Increased interest in sports activities suggests increased need for providing sports facilities such as golf courses, tennis courts, hiking and bicycling facilities, etc.

- Increased complexity of planning and marketing for the tourism industry implies more sophisticated tourism planning to insure profitable operations that are integrated with the overall regional tourism industry.

- More even seasonal distribution of tourism in most regions of Canada including Alberni-Clayoquot.

Tourism Activity Trends

- Increased interest in outdoor recreation activities suggests significant increases in personal expenditures for recreation items.

- Increased interest in challenging high risk activities such as water skiing, scuba diving, etc.

- Swimming will continue to be the most popular recreation activity.

- Increase in specialized tours including organized bus tours and weekend excursions suggesting short boat tours, special events, entertainment, education-skill development activities with all-inclusive price (admission fees, lodging, etc.).

- Increased interest in cultural-historical facilities especially to the growing educated market.

Population Trends

- A declining birth rate and an increase in the average age of the population implies age distribution shifts through to the year 2000. Changes in the population structure will produce changing vacation demands.

- Changing age structure characterized by decline in children (0-14), teenagers (15-19), young adults (20-34) and an increase in mature adults (35-49), empty nesters (50-64) and seniors.

- Decline in the proportion of families with children, in average family size and increase in the proportion of non-family households means a decrease in visitor party size.

- Decrease in family based travel means more trips, demand for adult entertainment and shoulder season holidays.

- Increased education will mean more willingness to travel.

- B.C. population increase of 2.2% per year over the next 25 years equals to 2 million more people by 2006 and an additional 750,000 in the primary market area by 2001.

9.8.1 Implications for Alberni-Clayoquot Region

The above sections provided a review of the population, economic social, and tourism activity trends. What do they mean for Alberni-Clayoquot? The following section outlines some of the major conclusions, and emphasizes what appear to be the major implications of the emerging trends for the tourism industry on Vancouver Island.

i) Future population growth will be slightly slower than in the recent past. As shown below, the total population growth in the primary market area will be about 750,000 by the year 2001.

PRIMARY MARKET POPULATION PROJECTIONS[5]

	Lower Mainland GVRD	Vancouver Island	Alberni-Clayoquot
1981	1,168,320	495,410	32,555
1986	1,224,782	530,760	31,257
1991	1,312,732	597,271	31,257
1996	1,431,327	672,013	35,992
2001	1,565,954	756,710	40,253
2006	1,696,744	850,791	44,149

The implications of the population projections are that there will be an additional 750,000 people added to the primary markets by the year 2001. As well, the population will grow by an estimated 2 million across the province by the year 2006. While this represents substantial new markets for Alberni-Clayoquot it also implies that the region should try to expand its visitors from within the existing markets.

ii) In terms of age structure changes, the "mature adult" group (35-49 years of age) and the "seniors" (65+) appear to be the

[5]British Columbia Population Projections 1984-2006, B.C. Research, June 1983.

growth sectors of the 1980's. During this decade the "mature adult" group is expected to grow by about 27%, while the "seniors" population is expected to grow by about 16%. On the other side of the coin, the younger age groups especially are likely to decline in numbers.

The implications of these age structure changes are that a greater effort in tourist programs and marketing will be required to accommodate them. Since different age groups enjoy different types of activities, it will be important to cater to the interests of the growth sectors while, if possible, also appealing to the other groups. In terms of both the marketing of existing facilities and the development of new tourist facilities, it will be important to focus on the particular markets which one wishes to attract.

iii) The emerging tourist markets are very segmented. Changing social conditions such as later marriages, increased divorces, fewer children, single parent families, two-income families, increased education levels for the general population, greater leisure time, and more diverse interests have combined to produce a much greater variety of recreational experiences. This general situation has been compounded by economic uncertainties where the more optimistic economic outlook of the 1970's has been replaced by higher inflation and higher unemployment in the 1980's. Although the expanding tourism markets that emerged in the 1970's still exist, the changing economic conditions have affected the ability of some people to participate in certain types of vacations.

The major implications of the above trends are:

a) The better educated, more discriminating customers of the future will have varied interests and be more aware of alternative attractions. This suggests that Alberni-Clayoquot will have to compete with other areas and other types of attractions for this market. Marketing will therefore be more important to the success of the tourism industry than it is at present.

b) In the uncertain economic environment, one adjustment for some people has been towards more modest vacations - staying closer to home, and spending all their time in one place. In that context Alberni-Clayoquot has much to offer - it is near large population areas and it has a significant National Park as a destination attraction. Thus it would appear that it can take advantage of the economical vacation advantage.

c) The tighter economic conditions have produced greater concern for "value for money". In this context the tourist facilities in the region must recognize the importance of good, old-fashioned hospitality to satisfy customers who, in turn, will recommend the area to others.

iv) Self-fulfillment, especially self-improvement and education, has become an important aspect of many people's vacations. This includes the quality of the experience. Such trends are reflected in the growing importance of outdoor recreation which include elements of challenge, risk, excitement, and escape, and the growing popularity to package holidays oriented to the interests of a particular group of people.

The implication of the above trends is that there appears to be a marketing opportunity for emphasizing the experience that one can obtain. The suggestion is that an emphasis be put on what one can do in Alberni-Clayoquot that will be interesting, different, educational, and which will provide an experience that will remain after the visit to the area is over. Participation, education, challenge, and escape all seem to be important dimensions of these types of activities.

v) In the highly segmented tourist market that increasingly will exist, it may be useful to better understand why people participate in certain types of recreational activities. Information related to this issue although not stated empirically, is

included in this background report. Obviously, through an understanding of the motivation behind different interests, there are opportunities to develop new types of tourism activities upon a reasonably sound foundation.

The implications of the above suggestion are that in addition to identifying what people do in Alberni-Clayoquot, this report should probe why they do it.

vi) A promotional program for tourism in Alberni-Clayoquot focuses on three primary objectives:

- to attract more visitors (both first-time and return);
- to get people to stay longer, especially in the shoulder season;
- to get people to spend more money.

The implication of the above is that a two-part marketing program, as follows, is appropriate.

- One part would focus on the area and would deal with its activities, types of attractions, etc. and would especially deal with the development of a marketing focus and promotional theme.

- Another part, which would be done by individual attractions, would focus on the individual items of interest.

In the highly competitive tourism environment that exists, effective promotion and marketing will be crucial to increasing visitation. If people do not know of the opportunities that exist in this area, they will go somewhere else where they are better informed.

vii) The Alberni-Clayoquot Region has outstanding natural tourist attractions and interests. The Pacific Rim National Park is the main tourist destination in the region and the major focus of visitors to the region.

The implication of the above situation is that efforts should be made to make visitors to Alberni-Clayoquot more aware of the other attractions in the region. This could be done through the provision of tours starting from Port-Alberni, Ucluelet, Tofino and Bamfield. The intent of the exercise is of course not to get people to leave the municipalities to spend their dollars in other parts of the region, but rather to get them to spend additional time, and hopefully some extra money, elsewhere in the region in addition to their stay in the major tourist nodes.

9.9 COMPETITION/MARKET SHARE

Modern travellers have many options when making a decision about how and where to spend their travel dollars. If their main purpose (other than visiting friends and relatives) is sightseeing and camping then each existing market segment to Alberni-Clayoquot can choose from a number of similar destination regions offering relatively the same experience. The most significant competitive regions are:

- Qualicum Beach-Parksville
- Sunshine Coast
- Gulf Islands
- Campbell River
- Long Beach, Washington
- Olympic Peninsula
- Oregon Coast

Although it may be assumed that these regions tend to have much higher visitation[1] than Alberni-Clayoquot this should not suggest that they are more responsive to the tourist demand. Long Beach, Washington[2] has been a tourist focus for the Seattle market for the

[1] No information exists - discussions with B.C. Tourism

[2] 1982 visitation; 250,000 visitors

past 75 years; the Gulf Islands are easily reachable from Vancouver via direct ferry, and Qualicum-Parksville is also close to the ferry and therefore very accessible. All these competitive regions have also been promoted for many years and consequently have an established reputation, repeat visitation and product loyality. Alberni-Clayoquot on the other hand is a relatively new, emerging destination area. Based on the estimates of the B.C. Tourism model, the region is only receiving approximately 8% of all the visitors to Vancouver Island - a significantly low percentage considering the wealth of natural resources that could potentially correspond to the expressed trip characteristics of the traveller [illegible] Vancouver Island.[1]

The following description of the competitive regions has been developed by both visits to these areas as well as conversations with such groups as the Parksville Tourism Association, B.C. Tourism Seattle, etc. A matrix outlining the level of competition of each region is provided in Figure 7.

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Qualicum Beach-Parksville

The area has long been known as a summer retreat with people attracted to large-warm water beaches and the frequent sunshine due to the local rainshadow effect. The overall product is considerably different from Alberni-Clayoquot as the region offers a more resort like atmosphere characterized by a higher visitation density and a proliferation of motels, fast food restaurants and gift shops along the Island Highway. Despite aging tourist facilities there still remains a diversity and a quality of accommodation and food services that make the region competitive. The beaches, fishing, more reliable weather and access to the ferry are important draws. However, the area does not offer the high quality sightseeing and natural attraction opportunities of Alberni-Clayoquot. There are few man-made attractions and the festivals and special events are local in scope and focus.

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[1]The region provides ample opportunity for sightseeing (63%), Camping (14%), Fishing (14%), and Boating (14%).

COMPARISON WITH COMPETITIVE REGIONS

	Qualicum Beach Parksville	Sunshine Coast Coast	Gulf Islands	Campbell River	Long Beach Washington	Olympic Peninsula	Oregon Coast
NATURAL RESOURCE ACTIVITIES							
- Saltwater Boating/Cruising	●	●	●	●	●	0	●
- Fresh Water Boating		0		0		0	
- Nature Interpretation	0	0	●	0	●	●	●
- Sightseeing	0	0	●	0	●	0	●
- Canoeing/Kayaking	0	0	●	●	●		0
- Saltwater Sportfishing	●	●	●	●	●	0	●
- Freshwater Sportfishing		0		0			
- Beachcombing	●	0	●	0	●	0	0
- Swimming/Bathing	●	0	●	0	●	0	0
- Scuba Diving	0	●	●	●	0	0	0
- Skiing						0	
MAN MADE ATTRACTIONS							
- Federal Parks						●	●
- Provincial/State Parks	0	0	0	0	●	0	0
- Fish Hatchery	●			●		●	
- Attractive Towns	0	0	●	0	●	0	●
- Native Communities				0			
- Festivals/Special Events	●	0	●	●	●	0	●
- Museums	0	●	●	●		0	0
- Tours-fishing/logging		●		0	0		
SERVICES							
- Destination Resorts	●	0	●	●	●	0	●
- Campground Resorts	●	0	●	●	●	0	●
- Quality Restaurants	●	0	●	0	●	●	●
- Published Information	●	●	●	●	●	●	●
- Recreation Facilities	0	0	●	●	0	0	0
- Prices						0	0
ACCESS TO THE SAME							
- Primary Markets	●	●	●	●	0	●	0
- Secondary Markets	●	0	●	●	●	0	0
- Tertiary Markets	●	0	●	●	●	0	

LEGEND

High Competition ● Moderate Competition 0 Low Competition

FIGURE 7

Sunshine Coast

The coastline northwest of the Greater Vancouver Area is directly accessible by the Langdale Ferry and offers an excellent opportunity for one day excursions. As well, Powell River and Pender Harbour are accessible for weekend trips. There is not as much opportunity for major activities found in Alberni-Clayoquot such as beachcombing or hiking and scuba diving is not as good. Powell River has, however, established itself as a major diving center offering excellent dive tours. Pulp Mill tours and a museum are also available. The more or less continuous development along the coast creates a decidedly different atmosphere from the semi-wilderness character of Alberni-Clayoquot. Unlike the Pacific Rim area, Powell River enjoys good air access.

Gulf Islands

The Islands are easily accessed via ferry from Tsawwassen/Swartz Bay and consequently strongly compete in the primary market of Greater Vancouver and Victoria. As a favoured vacation by this market for the past 50 years, the area has developed into a high quality tourism provincial destination. Variety in accommodation and food services as well as popular festivals and craft fairs, offering sophisticated crafts, assure repeat visitation and a positive image.

The area is comparable to Alberni-Clayoquot for salt water fishing and boating and penetrates similar primary and secondary markets. Marine Parks, attractive towns, island atmosphere and a particular "west-coast" lifestyle, are among the favoured attractions. The Islands successfully compete for such activities as sightseeing, boating, diving, salt water kayaking and unlike other competitive regions, is favoured by cyclists and day trippers. There is an overall price disadvantage for accommodation and food services compared to Alberni-Clayoquot but this is offset by easy access.

Campbell River/Courtenay

This area has built a strong reputation on its sportfishing (B.C. Salmon Capital) and the support services that go with it (air access, outfitters, charters etc.). The Salmon Festival and Courtenay Derby are major special events and together the two municipalities involved offer a variety of quality restaurants and hotels. Sightseeing opportunities are not as prevelant and the area lacks the uniqueness of the Pacific Rims' coastline although there are interesting islands such as Denman and Hornby. Quadra Island is the location of a significant native community and a museum that is well attended.

Despite the strength of the fishing image in this area, salmon sportfishing seems to be better in the Alberni Inlet and Barkley Sound Waters. This suggests that with extensive promotion Alberni-Clayoquot could become equally well known for salt water fishing. However, more than promotion will be required since it will also be necessary to successfully compete with comparable services. Campbell River for instance is serviced by scheduled PWA jet service and this would not be possible at Port Alberni - "the Salmon Capital of the World". Fresh water fishing is also available in the stocked lakes of Forbidden Plateau. The best skiing on the island (Mt. Washington) is available in this region giving it a competive edge in snow-based winter tourism.

Long Beach, Washington, D.C.

As with the Alberni-Clayoquot region, this spit of land on Washington's coast, is undergoing significant changes with respect to tourism. Once a major tourism destination for Seattle residents it lost much of its tourism industry in the 60's and 70's due to an aging tourism plant. It is now experiencing a revival that has been sparked by the construction of a $9,000,000 conference center hotel. This has resulted in a new local initiative to re-establish Long Beach as a destination for the Northwest. A theme has been adopted

called "early seashore" and orients developers and promoters to express the beach features that were popular at the turn of the century.

Not only does the Long Beach region of Washington State have a similar name but there are also a number of similar natural features which compete for the Pacific Northwest traveller such as beaches, topography and services.

The beaches stretch over long distances but lack the rugged character of Pacific Rim National Park. They are also backed by high dunes. The landscape is flat as it is a peninsula formed as a result of deposits from the Columbia River, unlike the rugged rocky nature of the Estowista or Ucluelet Peninsula. Services are similar in that they are mostly small family operated restaurants, motel, salmon charters, etc. including two high quality restaurants.

Like many American travel destinations Long Beach has a pricing advantage over Canadian tourism regions. However, the low price structure in Alberni-Clayoquot makes the costs more comparable. The Long Beach area competes for the primary market but also seems to be popular with travellers from Alberta.

Olympic Peninsula

The proximity of this region to the Lower Mainland and Victoria suggest that it draws from the same markets as Alberni-Clayoquot. Access is easy via ferry or a good road network. The area, like Alberni-Clayoquot, is symbolized by a unique National Park (Olympic) which offers not only beach resources but also mountain/alpine features accessible by automobile. The towns of Port Angeles, Port Townsend offer a tourist oriented product with attractive guest houses, bed and breakfast and restored hotel rooms at competitive

prices. While the area has not developed an outstanding reputation for salmon fishing it has the best steelhead fishing in Washington State. The region is more focused on the interior landscape of rivers, Olympic National Park and the attractive towns of Puget Sound (Gigs Harbour, Brunerton).

Oregon Coast

This region offers marginal competition to Alberni-Clayoquot in the primary and secondary market segments. Although most of its visitation is from the American Northwest and California its rugged coastline and low prices also attract Canadians from B.C. and Alberta. No figures are available on the percentage of Alberni-Clayoquots' primary market to this region, however, interviews with B.C. Tourism suggest a growing interest amongst B.C. tourists and businessmen to this area. The coastline, as compared to specific municipalities such as Crescent City and Norfolk Beach, tend to be the destination of Alberni-Clayoquot primary market segments. Although the land/seascape is remarkably different, people are attracted to similar features and activities including saltwater fishing/touring, attractive towns, beachcombing, sightseeing, nature interpretation, festivals and special events. Because of the large demand in this area there are a number of popular destination resorts and campground resorts.

In summary there are many locations along the American and Canadian west coast that offer a more diverse and reasonably priced product that compete for the Alberni-Clayoquot primary market. On the other hand, Americans from the Pacific Northwest are attracted to Vancouver Island and Victoria. If they extend their stay in B.C. it is usually followed by a trip to Vancouver rather than to the natural attractions of Alberni-Clayoquot. Only increased promotion could change these patterns and put Alberni-Clayoquot in a more competitive position.

10.0 SYNTHESIS

The synthesis is a refinement of the natural, heritage and social resource inventory and analysis as well as the market data. For the purpose of clarification it is presented in terms of issues, trends, opportunities and constraints.

Issues are those factors that surface as the most important items to be dealt with in a tourism strategy. For the most part they have been defined through the interview process and given priority based on their importance to the economic viability and long term growth potential of the tourism industry. The strategy for tourism in Alberni-Clayoquot must respond to the issues.

Trends are projections in future tourism and demand. There are no available statistical data to make accurate projections of regional trends. In fact, there is even some discrepancy in the existing empirical projections[1].

Trends are based on the perception of various regional tourism operators[2] as well as the consultant's knowledge of overall shifts in the industry based on experience and access to international, national and provincial literature on trends.

Opportunities refer to the potential development options that would respond to the issues. As such, they become the basis of the tourism strategy. At this stage in the planning process they can be divided into three categories:

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[1]For example, the Vancouver Island Tourism Region Study (section 3.2.4) projects an increase in person trips. B.C. Research Statistics (1982 Tourism Model), however, indicates that the tourism has been declining on Vancouver Island since peaking in 1979.

[2]Although most operators will not give exact statistics it is possible to estimate (non empirically) overall future growth/decline in the various segments.

- those actively being considered;
- those about to be developed;
- those that would seem to respond to the tourism industry issues.

Development opportunities are presented in the background/ technical document because they have surfaced as part of the inventory, analysis, and synthesis process. Final selection will take place during the master planning process where the actual feasibility of each development opportunity will be considered.

Constraints are those aspects that inhibit tourism development. Although specific constraints may be dealt with at the master planning stage, the overall barriers to successful tourism development are presented at the synthesis stage.

The data are presented here at both the global level as well as at the level specific to the various regional tourism components.

10.1 GLOBAL

10.1.1 Issues and Trends

Issues:

- Alberni-Clayoquot is a regional destination in a destination province.
- This region offers the only complete "west coast" experience in B.C. in terms of contact with the Pacific Ocean.
- It is not well promoted and information can rarely be found in major provincial tourism information centers.
- It is off the main traffic flow along the Island Highway.
- The highly developed Parksville/Qualicum Beach Area provides stiff competition because of its beaches, sunshine and abundance of facilities.
- Areas of the region that are constantly exposed to rain will always have a problem attracting and holding tourists.

Trends:

- With national media exposure, growth in package tours, Parks Canadas' national promotion, interest in whales, etc., the Alberni-Clayoquot region will become better known (R)[3].
- There is growth in the market segment seeking outdoor recreation semi-wilderness type adventures (I,N,P,R).
- Increase in the "value for dollar" travel will make Alberni-Clayoquot an increasingly attractive destination (I,N,P).
- Growth in package tours and special interest travel will open up new opportunities for Alberni-Clayoquot (I,N,P).
- increased competition amongst destination regions in B.C., as well as with Washington and Oregon coast will require aggressive marketing of the region.

10.1.2 Opportunities/Constraints

Opportunities:

- The west coast image (rugged coast, beaches, fishing villages, rain forest) is very distinctive and can be easily identified.
- The region is assured national exposure because of Parks Canada's promotion of Pacific Rim National Park.
- A significant primary market exists within a few hours drive i.e. Parksville-Qualicum, Vancouver, Lower Mainland, Victoria Area, as well as the 2.2 million visitors to Vancouver Island.
- Visitors to Expo 86 will be seeking a variety of west coast experiences including the semi-wilderness type.
- Proximity to Vancouver and Seattle - two urban markets that could be attracted on a year-round basis, to the character and solitude of the region.
- Appeal of the ocean and beaches to prairie markets.
- The area is presently undeveloped and therefore can now start development in an orderly fashion.

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[3] Note: The following symbols have been used to classify trends: I-International, N-National, P-Provincial, R-Regional.

Constraints:

- Difficulty of access to Alberni-Clayoquot from Vancouver or Seattle because of the ferry and Route 4.
- The region is known for its unusually high rainfall.
- Special efforts will have to be made to market for the shoulder season in order to strengthen the viability of the existing industry.
- The region is known as a place for a cheap vacation and per capita expenditures are low.
- It will take several years of promotion before the region becomes well known in the primary and secondary market.

10.2 Regional Tourism Components

The region will be classified according to:

1. Attractions and Events
2. Accommodation
3. Food Services
4. Entertainment
5. Transportation
6. Information Services
7. Recreation
8. Organization
9. Human Resources

10.2.1 Attractions and Events

Issues:

- The region has developed a tourism base because of its natural attractions.
- Pacific Rim National Park has been the main stimulus in the protection and promotion of these natural resources. It must continue to help develop and promote the region.
- There is a complete spectrum of land-based, water-based and coastal natural attractions.

- Activity opportunities in the region are balanced between land and water.
- The Canadian Princess, Lady Rose and the proposed Port Alberni Harbourfront are the only significant man-made attractions.
- A complete Harbourfront attraction development will be essential to Port Alberni's successful tourism industry.
- There is no major special event in the region despite an abundance of craft and theatrical people.
- Native themes have not been developed.
- There should be a significant attraction in each development node or community.

Trends:

- There is a growing demand for nature oriented tourism destinations (I,N,P).
- The European and American markets are increasingly interested in Canadian wilderness and semi-wilderness experiences (I).
- Competition for these markets is increasing - e.g. from Long Beach, Washington, Queen Charlotte Islands and the Oregon Coast (I,N,P).
- The middle to upper middle income groups are seeking retreat/refuge type vacations, as witnessed by the increased demand for facilities like Pacific Sands and Ocean Village[4] (I,N,P).
- People are increasingly travelling to high quality special events, theatrical presentations and craft shows (I,N,P).
- There is a growing interest in native west coast art (I,N,P).

Opportunities:

- Most proposed quality attractions would be well attended because of lack of competition and the frequent search for alternative activities to those provided by the natural attractions.
- An abundance of themes for attractions/events exist as well as the natural resources to support them, e.g. fishing, marine life, logging, etc.

[4]Interview with Owners.

- Port Alberni and Tofino are dynamic communities with talented native and white craftsmen and women and active volunteerism.
- There is a potential captive market because this is not a pass through region.
- Attractions/events will contribute to the length of stay and repeat visitations, and shoulder season visitation.
- A major, unique attraction would contribute to overall interest in the RDA-C and enhance its image within the province.
- The regions' warm winter climate makes certain year-round attractions possible.

The following is a list of identified opportunities that have been considered:

. Port Alberni - Complete Harbourfront Development including Downtown Redevelopment.

. Alberni Inlet - Additional vessel to supplement the Lady Rose. One daily going to Bamfield, one going to Ucluelet in the summer.

. Sproat Lake - Recreation/tourism development along Lakeshore Road including a water play park.

. Della Falls - Continued trail expansion into Strathcona Park.

. Bamfield - Development of the Boardwalk including cafe, craftshops/studios, marine supplies, exhibit space, etc.

. Ucluelet - Development of the Canadian Princess Property into a complete Destination Resort/Attraction.

- Establish an interpretation attraction based on the logging and fishing industries to be located on the Inlet. This is to be done in collaboration with the industries.
- Group a mixture of tourist oriented retail outlets either as part of a forestry/fishing interpretation attraction or at Davison Plaza.

. Tofino
- Establish a typical "fishermans village" on Brownings Passage including a fish market, craft/ souvenirs, small restaurant, protected gathering area for salmon/crab suppers and exhibit space.
- Establish underwater marine exhibit in Brownings Passage to display native fish, plant species, shipwrecks, etc. This could be a moderately priced silo type structure that is connected to land by an above water pedestrian bridge.

. Clayoquot Sound
- Immediate development of minimal attractions on Meares Island including interpretation exhibit of Fort Defiance, nature trails, etc.

- Establishment of a Native Cultural Resort providing accommodation, food services, courses in native west coast art in an atmosphere of traditional architecture (long house) and spiritual retreat. Two possible locations are the Clayoquot Sound Islands or the Christie Residence (Tinwis).

- Develop a major native whaling museum adjacent to the Christie Residence (Tinwis).

Constraints:

- The existing low tourist volume and short season have not shown that it is profitable for private enterprise to develop attractions.
- Attraction developments in this region are comparatively more expensive in terms of construction and operation.
- Most attraction developments are capital intensive and will require partial funding from government sources.

10.2.2 Accommodation

Issues:

- The upscale properties are financially very sound and have high occupancy while the intermediate level hotel/motels show a marginal rate of return over the entire year.
- The grade of the average lodging is acceptable but not keeping with the high quality of the natural resources.
- The short season is the major problem facing accommodation owners.
- Quality properties successfully attract visitors on a year-round basis because of their location and product.
- Lack of activities during inclement weather means a short average length of stay at motels and campgrounds.
- It is very difficult to operate a viable campground in the region.
- Bamfield has a major problem in coping with Recreation Vehicle parking.
- Float homes are creating a visual and sewage problem in parts of Barkley Sound.

Trends:

- There is an increasing demand for quality, seashore accommodation units (I,P,R).
- Interest in conference/small seminar facilities continues to be small (P,R).
- Package tours and the changing age structure of visitors is causing slight visitation increases in shoulder seasons for some areas (N,P,R).
- More quality in the destination resorts would change the existing tourist profile to higher income groups (R).

Opportunities:

- Based on existing occupancy rates the region could accept an additional 100-150 upscale units with a beach location.
- Existing private campground land could be best used for destination resort development.

- There are no opportunities for more units in Port Alberni.
- The bed and breakfast operations could be developed and promoted to a greater extent.
- Seasonal accommodation units would relieve the present seasonality problem in the accommodation sector.

Specific opportunities include:

. Bamfield
- Construction of a 100 unit campsite to relieve the congestion in the village center as well as increase family visitation.
- Development of one upscale resort on Pachena Bay.

. Barkley Sound
- Development of a campground to serve the Broken Group in the vicinity of Howard Point.
- Expansion of a campground and beach development at Toquart Bay.

. Alberni Inlet
- Construction of water access resort/subdivision at Chup Point.

. Ucluelet
- Development of a full season destination resort complex with the Canadian Princess.

. Tofino
- Construction of possibly two major destination resorts (60-80 units) along the beach properties.
- Development of planned beachfront vacation home.
- Conversion of Christie Residence into 40-50 seasonal accommodation units.
- Recycling of Nurses Residence into 10 unit family oriented hostel possibly run by the Canadian Youth Hostel Association.
- Complete upgrading of Pacific Rim Resort Camp.

. Pacific Rim National Park
- Long term construction of 300 - 400 campsites.

. Great Central Lake - Recycling of Ark Resort into quality retreat and departure point for Della Falls.

. West Coast Trail - Development of Hostel/Budget accommodation in the former structure of Shantymans Christian Association.

Constraints:

- Parks Canada is unable to construct campgrounds due to existing agreement with the private sector.
- There are no immediately apparent local investors to respond to existing and proposed accommodation demand.
- Bamfield Campground will require government funding.
- Low tourist visitation and high seasonality have a major impact on accommodation profits.

10.2.3 Food Services

Issues:

- Most quality restaurants suffer financially because of their high overhead and short season.
- Because of unsteady volume it is frequently difficult to get fresh seafood.
- Good restaurants are found in all locations other than Bamfield.
- Fish/crab outlets are scattered about and frequently difficult to find. There are no central fish/produce markets.
- Only one restaurant is located on the seashore (The Wick) which is unusual for a coastal destination.

Trends:

- As the socio-economic profile shifts to older more affluent markets there will be increasingly higher demands for quality restaurants (I,N,P,R).
- The family and cost-conscious groups will continue to require fast food take-out style (N,P,R).
- Fresh fish will be expected more frequently by the demanding public (N,P).
- Package tours and an expanded tourism season will make fresh fish purchasing more predictable (I,N,P).

Opportunities:

- While the present restaurant capacity serves the existing visitors there will be opportunity for the following waterfront restaurants.

. Tofino - As part of the wharf side Fishermans Village.
- At each beach destination resort.

. Ucluelet - As part of the Fishing/Forestry Exhibit Complex.

. Port Alberni - At Harbourfront.

. Bamfield - A boardwalk cafe with local architecture and charm.

- Readily identifiable fish markets should be located in each of the four communities and in association with the various proposed attractions.
- The Wick should be upgraded, (menu, food standard), to a quality restaurant in keeping with the uniqueness of the site, Parks Canada standards and the memory of the former Wickaninnish Inn.
- More high quality prepared fast food outlets should be available.

Constraints:

- Opportunity for more quality restaurants and more fresh food in the existing ones will be based on increased traffic volume, a longer tourist season and shifting market profile to more affluent travellers.

10.2.4 Entertainment/Programs

Issues:

- Port Alberni is the only source of bar/lounge entertainment.
- In Ucluelet and Tofino there is only minimal evening entertainment for tourists. Local night spots are not attractive to visitors.
- Specific activities are available during festivals and special events.
- Parks Canada has the only continuous organized programs for visitors including a Rainy Day Program.
- Parks Canada will open a new interpretive center (summer 1984) at the Wickaninnish Center.

Trends:

- More than 50% of the travellers are singles or couples without children and are increasingly looking for night time entertainment (I,N,P).
- Families are looking for programs for children and families.
- Package tours expect evening entertainment.

Opportunities:

- Local hotels, restaurants could organize local talent (including their own staff) to provide evening entertainment (music, theatre).
- Theatre groups that provide presentations at festivals could operate on an expanded schedule throughout the region.
- Ongoing community events should be held in each community with the tourist in mind.
- All future attraction development (including the new Parks Canada Theatre) should stress evening and rainy weather shows.

Constraints:

- Multiple shows and events are difficult to organize and require the use of volunteers, service staff, etc.

10.2.5 Transportation

Issues:

- Despite scheduled bus service between Tofino, Ucluelet and Port Alberni, public transit is very inefficient for tourists, and consequently most traffic is by private automobile. This issue is particularly important to the Port Alberni area.
- Pacific Rim Airlines has started scheduled service between Port Alberni, Vancouver and Tofino.
- If Port Alberni is to function as a comprehensive staging area for the region it should have an airport.
- There is an opportunity to increase access to the region by Cowichan Valley and Comox Road.
- Package tours are not a significant part of travel to the region.
- The Lady Rose offers an interesting alternative way to see the region especially when tied in with a local tour bus, i.e. the Coastline Adventures Tour.
- Route 4 is only significant access to the region.
- The Tofino airport functions below its potential.

Trends:

- There is rapid growth in the package tour part of the industry especially to destination regions[5] (N,P).
- The Canadian Princess has already started to provide bus and air packages (R).
- Europeans are interested in specialized tours to semi-wilderness region (I).

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[5]Growth in Alberta/British Columbia Package Tours 1978-1980: 31.5% (Scenic), 6.5% (Outdoor Recreation), 100% (Special Interest) - CGOT Package Tour Data Base, 1980.

Opportunities:

- More tour groups could be attracted to Tofino/Ucluelet coastline unit with a stop in Port Alberni.
- Port Alberni has the available accommodation units to handle many tours.
- Many of the proposed attractions would encourage package tour groups.
- Local innovative efforts such as Coastline Adventures Bus Tours should be encouraged, especially in the Port Alberni area.
- A supplement to the Lady Rose could provide scheduled service to Bamfield, Ucluelet and between Bamfield and Ucluelet on a daily basis.
- Fly/drive should be considered into Tofino.
- Alternative access to Bamfield from Victoria could be promoted via Cowichan Lake. As well, with minimum road upgrading there is opportunity for a circuit tour from Victoria to Nanaimo to Port Alberni, Bamfield, Nitnat Lake, Lake Cowichan and back to Victoria.

Constraints:

- It is hard to interest tour wholesalers because of lack of attractions, inconsistent weather and lack of information on the region.[6]
- Major construction or upgrading of alternative access, i.e. via Cowichan Lake or Horne Lake would be prohibitively expensive.
- Well designed and properly signed vista/interpretation areas should be established along Route 4 (i.e. along Kennedy River).

10.2.6 Information Services

Issues:

- The region is very poorly advertised in all market segments.
- Once in the region, information is difficult to find, i.e. information centers are inconspicuous.

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[6] Interview with Tour Operators

- There is little information transfer within the region, i.e. Tofino does not know what Ucluelet is doing.
- There is no overall regional brochure with a regional image.
- Parks Canada and the Canadian Princess are the biggest promoters of the region with additional individual pamphlets coming from various operators.

Trends:

- Travellers require increased levels of promotion information to assist in making their travel decisions (N,P,R).
- Destination regions are more frequently being considered by the market for the diversity of services and product they offer (N,P).
- Some competitive regions, i.e. Campbell River, are presenting a cohesive image to the visitor (N,P).
- Regions such as Mt. Waddington Regional District have a Regional Tourism Information Center (P).

Opportunities:

- A Regional Tourist Information Center should be developed at the entrance to the region (Cathedral Grove) or by converting the Port Alberni facility into a regional based center.
- A regional brochure is required to be forwarded to all B.C. Tourism outlets throughout B.C. and the U.S.A.
- Municipal information centers should be more obvious and should eventually become part of the proposed attractions.

Constraints:

- Government funding will be necessary to build a separate Regional Information Centre or compensate Port Alberni for the acquisition of theirs.
- A regional brochure will require much intra-regional cooperation, effort and organization.

10.2.7 Recreation Facilities

Issues:

- Only Port Alberni has significant recreation facilities that can appeal to a significant number of tourists, i.e. Museum Echo Center. The parks and playgrounds are only for local use in each community.
- The proposed attractions can be used and supported by locals. Harbourfront, in particular, will be popular with the citizens who will use the market and restaurant. It will also improve the local the community image. The attractions in the other towns will be a focus for both tourists and locals.

Trends:

- Existing tourist services in the region such as restaurants are now more frequently being used by locals (R).
- More tourism based communities are programming their schools, halls, arenas, etc., for summer time tourist activities and entertainment e.g. suppers, plays, video presentations, craft fairs, etc. (N,P,R).

Opportunities:

- Harbourfront, as a tourism attraction and local recreation facility, should be promoted for maximum interaction between tourists and locals.
- Christie Residence, if developed as a seasonal accommodation should introduce tourists to native cultural and educational activities that can also be programmed at the same time.
- Village Park - Tofino can be used more frequently for fairs and festivals.
- Ucluelet could decorate its Peninsula Road for the entire tourist season and provide activities (especially in the Davison Plaza) on a continuing basis.

- The Community Hall in Bamfield can be used for suppers and exhibits.

Constraints:

- The various municipalities have few recreation facilities and have not made full use of schools and halls to entertain the tourists.
- The programming of recreation facilities for tourists requires political leadership, recreation organization and a spirit of volunteerism.

10.2.8 Organization

- There are several groups and agencies involved with the development and promotion of tourism including the Chamber of Commerce, EDC, RDA-C, Town Councils, Parks Canada, Provincial Parks, as well as individual operators, but there is only minimal communication between a few of them.
- There is a general lack of communication and collaboration between the various communities.
- No groups or individuals have a clear mandate to develop and promote tourism in the Region.

Trends:

- Those regions that are organized can more successfully compete for the tourists.
- Tourists are looking for cohesive, balanced packages when choosing a region.
- Destination regions must be presented to the market place in their entirety in order to maximize length of stay, attract several market segments and express the opportunities during the off season.
- The travel population is growing more sophisticated and demanding more information and resource presentation.

Opportunities:

- Alberni-Clayoquot seems to require a Regional Tourism Association with a full time director.
- This organization may be established by the Economic Development Commission and/or R.D.A-C or the Chamber of Commerce.
- The Regional Director would assume constant collaboration and coordination between all segments of the tourism industry.

Constraints:

- The establishment of an association requires a major effort in the first years in order to bring the various interest groups together.
- Some municipalities, e.g. Tofino and Ucluelet, must overcome some basic animosities and begin working together in a constructive manner within the Coastline Unit.
- The regional directors salary and promotion budget will require government funding for the first two years.

10.2.9 Human Resources

Issues:

- In Ucluelet there is a certain competition for labour during the tourist season because of the strength of its fishing and forestry sectors.
- Many youths leave during the summer months to seek employment opportunities elsewhere although some would prefer to stay in the region.
- The region has attracted many craftsmen and craftswomen who could make a viable living from their products if sales were better organized.
- Hospitality is excellent and the quality of service is acceptable.
- There is a certain lack of creative expression with respect to entertaining and welcoming the tourist. Management skills in many operations are only average. There are, however, some highly qualified managers, e.g. Whales Tail, Timberlodge, Canadian Princess, etc.

- There are relatively few resources in the region for staff and management training.

Trends:

- Industry growth and increased competitiveness will require more sophisticated training at all levels of the industry.
- Areas requiring continual upgrading under present conditions include:
    - use of computers
    - financial management
    - staff forecasting, etc.

Opportunities:

- Upgrading courses could be provided by North Island College, Parks Canada, or the proposed Regional Tourism Association.
- Courses should be offered in the off season with local establishments being used as training centers.

Constraints:

- Local businesses are frequently reluctant to spend money sending their staff on training programs.
- North Island College seems focused on the hard industries.

10.3 PROPOSED DEVELOPMENT OPPORTUNITIES

The synthesis has resulted in the identification of special development opportunities. The opportunities have been proposed at this stage of the planning process because they could potentially support the development strategy, and they correspond to the existing and proposed markets and the resource base.

The Master Plan will address, in more detail, the financial feasibility of the proposals, which will cause the elimination of certain ones or the restructuring of others.

Each potential development opportunity has been outlined in Table 9 according to:

- the markets they would attract;
- the regional resources they would use;
- the activities they could create; and
- their role in the overall development strategy.

Figure 8 groups the opportunities according to land/seascape units and consequently identifies the type of development that could be available for each node or area, as outlined in the concept.

TABLE 9 POTENTIAL FOR DEVELOPMENT OPPORTUNITIES

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
HARBOUR FRONT - PORT ALBERNI (Attraction)				**ALBERNI INLET UNIT**
- primary, secondary, tertiary - local residents - families - arts and crafts purchasers - visiting friends and relatives to Port Alberni - automobilists - shoppers - weekenders - bus tours	- Alberni Inlet - Downtown Port Alberni - Lady Rose - Citizens of Port Alberni	- shopping - browsing - sightseeing - charter/rental - historic interpretation	- attract tourists from surrounding areas - create a focus for a municipal tourism image - draw people from Rt. 4 into downtown Port Alberni - increase length of stay - increase visitor expenditure	- create additional tax revenues for city - attractive wharf setting for Lady Rose - must have all components in place before it becomes a true visitor attraction
LADY ROSE II - ALBERNI INLET (Attraction)				**ALBERNI INLET UNIT**
- secondary, tertiary - higher income adults - U.S. markets - visiting friends and relatives to Port Alberni - bus tours - package and incentive tours	- Harbourfront - Alberni Inlet - Barkley Sound - Bamfield . Boardwalk . Bradeys Beach - Deer Group Islands - Broken Group Islands	- sightseeing - transportation to Broken/Deer Group . canoeing . kayaking - photography - nature history interpretation	- build on the existing reputation of Lady Rose I - extend length of stay by at least one day - accentuate Port Alberni as staging area - promote coastal attraction and water board recreation image - encourage shorter trips	- 1-2 night stay in Port Alberni - expose key natural attractions such as Barkley Sound and Islands - attractive component as part of package tours

TABLE 9 Cont'd.

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
SPROAT LAKE WATER PARK (Attraction)				**SPROAT LAKE KENNEDY RIVER UNIT**
- primary - cost conscious families - local and regional residents - swimmers, boaters and water skiers - young adults and children - campers	- large, clean attractive lake - access from Rt. #4 - proximity to Port Alberni services	- swimming - water skiing - boating - general water-based recreation	- promote as significant attraction along Route #4 and in Port Alberni Area - increase length of stay in Port Alberni Area	- offers opportunity for fresh water-based activities - will provide an interior alternative attraction to coastal beaches
MT. ARROWSMITH SKI DEVELOPMENT UPGRADING (Attraction)				**MT. ARROWSMITH UNIT**
- local skiers - some regional skiers	- good ski slopes, existing ski facilities - acceptable snow conditions	- alpine skiing - cross country skiing	- promote winter snow based activities	- the development faces stiff competition from other regional facilities - difficult access, unpredictable snow conditions will continue to minimize its potential
DELLA FALLS AND TRAIL (Attraction)				**GREAT CENTRAL LAKE/STAMP RIVER UNIT**
- secondary, tertiary, (national and international) - backpackers - wilderness campers	- largest falls in North America - excellent trail system - available water access and accommodation at Ark Resort	- hiking (forest, glaciers, falls) - sightseeing - photography - nature/history interpretation	- create international reputation - promote semi-wilderness image for region - high quality outdoor experience	- over use would seriously impact upon the experience - possible conflict with future logging activities - limited access - new entrance to Strathcona Park

TABLE 9 , Cont'd.

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
BAMFIELD BOARDWALK (Attraction)				**BARKLEY SOUND UNIT**
- secondary, tertiary - childless adults - Lady Rose clients - families of sports fishermen - International/National users of the West Coast Trail	- views to Bamfield Inlet - unique walkway linking homes, marine facilities, store, etc.	- walking - browsing - shopping - sightseeing	- build upon Bamfields' unique features - create a focus for tourism movement and a link between several facilities	- the basic structure exists - will not be an attraction in itself but part of network of tourism services
MACMILLAN ISLAND OCEAN FISHERIES EXHIBIT - UCLUELET (Attraction)				**TOFINO/UCLUELET COASTLINE UNIT**
- primary, secondary, tertiary - families (young children) - bus tours - automobilists - childless couples - seniors/empty nesters - medium to high income groups - fishing enthusiasts	- exhibit space - small restaurant - fishing boat - boat cruises and docking facilities - souvenirs - playground	- observation - interpretation (industrial, ecological) - sightseeing	- provide activities in inclement weather - contribute to create a tourist activity focus for Ucluelet - all weather attraction to extend the season - improve Ucluelets' tourism image	- requires government capital/ operation funding - provides man-made attraction to complement natural attractions - land presently owned by MacMillan Bloedel - link boat cruises to tour groups
DAVIDSON PLAZA - UCLUELET (Attraction)				**TOFINO/UCLUELET UNIT**
- primary, secondary, tertiary - automobilists - bus tours - shoppers - medium to high income	- tourist oriented retail mix - pleasant shopping atmosphere	- shopping - browsing - eating	- encourage greater levels of expenditure - reinforce Ucluelet as a service center	- the basic structure exists requiring only upgrading - anchor to Canadian Princess/ Fisheries Exhibit

TABLE 9 , Cont'd.

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
FISHERMANS VILLAGE - TOFINO (Attraction)				**TOFINO/UCLUELET COASTLINE UNIT**
- primary, secondary, tertiary - local residents - medium to upper income families and childless couples - automobilists - bus/package tours - seniors/empty nesters	- boardwalk/public area - fish market - boat cruises - marina - souvenir/craft outlets - small restaurant - information - games area - mini cinema	- shopping/browsing - eating/drinking - education - gathering - mooring - tours of Clayoquot Sound	- promote all-weather attraction to provide tourist focus, extend length of stay and - reinforce Tofino's fishing village image - shoulder season service/ attraction	- may require government acting as main developer and renting commercial space - good for repeat visitation
UNDERWATER MARINE EXHIBIT - TOFINO (Attraction)				**TOFINO/UCLUELET COASTLINE UNIT**
- primary, secondary, tertiary - medium to upper income mature adults - tour groups - automobilists - marine enthusiasts - seniors/empty nesters	- access bridge to submerged cylinder - exhibit windows - souvenir shop - A/V equipment - appropriate fish, shipwrecks, etc.	- marine interpretation - observation - experience unique underwater situation	- promote as year-round attraction - unique Canadian attractions would increase visitation to the Region - promote specialized activity during inclement weather and alternative to natural attractions - improve image of Region	- requires government capital - short length of stay per visit - a small percentage of population will not go underwater - would be a first for Canada
NATIVE CULTURAL RESORT - CLAYOQUOT SOUND (Attraction)				**CLAYOQUOT SOUND UNIT**
- secondary, tertiary - rest/relaxation vacationer - upper income mature adults - educational/cultural enthusiast - arts and craft shoppers - native arts specialists - National, U.S.A., International	- beauties and solitude of Clayoquot Sound - talented native craftsmen - potentially accessible reserve land	- native craft lessons - production and sale of arts and craft - relaxation and sightseeing - spiritual regeneration - sightseeing	- expand upon a well known west coast resource - Native Arts and Crafts - promote opportunity for serious culturally oriented activities - unique and would therefore be well publicized	- difficult and expensive to build and operate on an island - requires much time and energy from community leaders/supporters - possible need for government funding - virtually no existing competition - promotes native values and lifestyles

TABLE 9 , Cont'd.

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
BOAT CRUISES/HOT SPRING COVE - CLAYOQUOT SOUND (Attraction)				**CLAYOQUOT SOUND UNIT**
- preschool bus tours - sightseers - small conventions - families - maritime travellers	- beauties and unique features of Clayoquot Sound - Hot Spring Cove, Meares Island, whales, history	- sightseeing - nature and cultural interpretation - bathing - overnight camping	- links the various features of Clayoquot Sound - encourage bus tours - implies at least one day of stay	- the Sound has plenty of features that can offer a variety of tour schedules - especially the popular 1-2 hour tours
BAMFIELD CAMPGROUND - BAMFIELD (Accommodation)				**BARKLEY SOUND UNIT**
- primary - cost conscious families - lower to medium income families - sports fishermen - recreation vehicle owners - hikers and outdoor enthusiasts	- access to Bamfield Inlet and fishing, scenic resources of Barkley Sound - proximity to services of Bamfield - local hiking trails and beaches - playground	- boating - camping/picnicking - fishing - hiking - relaxing - childrens activities	- provide a quality, reliable camping service - alleviate congestion on Bamfield streets - improve the resident perception of tourists - encourage more families to join fishermen	- the suggested site has high construction costs - requires capital funding support from government - increases tourism to Bamfield
DESTINATION RESORT - TOFINO (Accommodation)				**TOFINO/UCLUELT COASTLINE UNIT**
- primary, secondary, tertiary - medium to upper income adults - empty nesters - government seminars - rest/relaxation vacationer - specialize tours - automobilists - fly-drive - package tours - incentive traveller	- long beaches - coves - access to National Park - regional boat cruises and restaurants	- beachcombing - sightseeing - hiking - native interpretation - relaxing - eating - resort recreation	- increase expenditure in the region - shift visitor perception away from a low budget vacation area to a quality destination area - responsive to the recent expenditure on local infrastructure	- must develop investor confidence in a region that is relatively unknown - provide accomodation that corresponds to the high visual/recreational quality of the sites - responds to proven market conditions

TABLE 9 , Cont'd.

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
CHRISTIE RESIDENCE - SEASONAL ACCOMMODATION (Accommodation)				**TOFINO/UCLUELET COASTLINE UNIT**
- cost conscious families and growth - budget tours - automobilists - those looking for more than a campground without motel prices - school/university groups	- beach resources - excellent architecturally designed facility - native talents and resources - high quality kitchen and gymnasium - potential native museum site	- meals - beverage - entertainment - games - native programming	- provides revenue generating opportunities for residence - gradually introduces natives to tourism industry - prices accommodation between camping and motels - can be used for native purposes during off season	- develop native management skills - relatively low capital investment to start generating jobs/ revenue - requires government funding to convert facility - could be focus for native tourism including accommodation, museum, craft outlet, courses in native art.
NURSES RESIDENCE - HOSTEL (Accommodation)				**TOFINO/UCLUELET COASTLINE UNIT**
- youth travellers - back packers - budget families - small groups (i.e. travelling in a Van)	- proximity to services of Tofino and features of Clayoquot Sound - small kitchen - open play area	- basic accommodation - small meals	- low capital expenditure to provide services to this market - contributes to Tofino's positive attitude towards tourism	- difficult to find a group (private, government) who will take it over - could be used to house entertainers, workers, etc., during winter
PACIFIC RIM NATIONAL PARK CAMPGROUND EXPANSION (400-500 SITES) (Accommodation)				**TOFINO/UCLUELET COASTLINE UNIT**
- campers - national park users - budget conscious families - outdoor recreation enthusiasts	- quality campsites in attractive setting - trails to beach - basic services - R.V. hook ups	- camping - beachcombing - hiking - nature interpretation - park demonstrations	- greatly increase the supply of high quality campsites - supports semi-wilderness values of Parks Canada - positive image for region - increases length of stay and repeat visitation	- campground cannot be built under existing agreement between Parks and private enterprises - conflicts with efforts of private sector

TABLE 9 , Cont'd.

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
ARK RESORT - UPGRADING (Accommodation)				**GREAT CENTRAL LAKE/STAMP RIVER UNIT**
- secondary, tertiary - hikers - wilderness enthusiasts - fishermen - photographers - international adults - boaters	- access to Della Falls and Strathcona Park - large, attractive, clean lake in a semi-wilderness setting - proximity to Port Alberni - good fishing	- fishing - boating - hiking - wildlife photography	- contribute to the Port Alberni Area resource base - provide boat and hiking access to Strathcona Park - tie-in to promotion on Della Falls - exploit recent provincial publicity on Beauty Island lottery (Islands '86)	- much of the existing facilities require major refurbishment - excellent siting and the only facility to serve Great Central Lake and Della Falls
RESTAURANTS (Food Services)				
- all segment groups - motel users - medium to high income groups	- seaside or coastal locations - access to fresh seafood	- dining and eating - drinking - entertainment	- shift the perception of the region as a place for a cheap vacation to a high quality experience offering good food in a coastal, marine setting - increase length of stay and shoulder season activities	- although there is adequate restaurant space in all categories the region lacks facilities in seaside or coastal locations. Future restaurants should therefore only be developed as part of specified coastal attractions and new destination resorts
COMMUNITY SUPPERS (Food Services)				
- all segment groups - campers - all income groups	- community facilities - private resorts - campgrounds - relatively inexpensive seafood - hospitable population	- eating - drinking - entertainment	- increase contact between locals and tourists - use of local products - supports image of hospitality	- these activities are appealing to the large camper market - should be able to respond to inclement weather - involves participation of local human resources

TABLE 9, Cont'd.

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
LOCAL THEATRE PERFORMANCES (Entertainment)				
- all market segments - tour groups	- existing theatre groups in Port Alberni - community facilities - hospitality staff - students	- entertainment - dancing - participation	- provide activity during inclement weather - becomes part of tour package evening entertainment	- the existing theature groups in Port Alberni could perform and develop talent in other communities
SPECIAL EVENTS AND FESTIVALS (Entertainment)				
- varying market segments	- activity groups and volunteers in each community	- entertainment - education - dancing - participation	- provide publicity for the various communities - create new participative tourist oriented activities	- Tofino and Bamfield has no significant tourist oriented festivals - festivals should not be planned for those weekends when visitation is already high
CRAFT COURSES (Entertainment)				
- all segment groups - families	- local artists - strong, known native craft heritage - community and native band facilities	- craft production - education - participation	- provide activities during inclement weather - increase length of stay by at least one day	- one-day courses could be sponsored by municipalities, Parks Canada, native bands

TABLE 9, Cont'd.

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
REGIONAL TRANSPORTATION (Transportation)				
- tour groups - seniors - specialized groups - sightseers - weekend traveller - clubs/ogranizations - small seminars	- variety of land and water-based travel corridors - diversity of physical attractions - strategically located service centres	- sightseeing - interpretation - picniking	- provide greater access to more regional attractions - strengthen greater Port Alberni Area tourism package - attract more than just the automobiles - support certain complementary activities such as boat cruises	- the existing market is heavily dominated by the independant automobile travellers - new bus tour/group markets would have to be attracted
BOAT CRUISES (Transportation)				
- tour groups - sightseers - locals	- both coastal and inland water bodies - strategically located service centers	- sightseeing - interpretation - fishing	- 1 or 2 hour boat tours may encourage an extra days stay - could be part of an over receptive tour operation	- needs a variety of sized boats many of which exist in the region - must be promoted to attract increased use

TABLE 9, Cont'd.

MARKETS	RESOURCES	ACTIVITIES	STRATEGY	OPPORTUNITIES/CONSTRAINTS
REGIONAL TOURISM INFORMATION CENTRE (Information Services)				
- all market segments	- one major access into this destination region	- education - awareness of attractions and services	- give the arriving tourist a comprehensive appreciation of the region including available accomodation, current events etc. - strengthen the regional image	- would have to be supported by a regional tourism association - must be strategically located at entrance to region
REGIONAL BROCHURE (Information Services)				
- existing market segment - potential market segment	- regional level authorities such as: . Regional District . Economic Development Commission . Regional Tourism Association	- distribution into major markets	- increase knowledge and awareness of region - increase total numbers of visitors	- expose the region to the tour wholesalers, tourist bureaus etc.

LAND/SEASCAPE UNIT
DEVELOPMENT OPPORTUNITIES

- Tofino (T)/Ucluelet(U) Coastline Unit
- Clayoquot Sound Unit
- Kennedy Lake Unit

	SEASON				MARKETS			STRATEGY					SECTOR		
	Year round	Summer	Winter	Shoulder	Primary	Secondary	Tertiary	Length of Stay	Weather	Image/Theme	Volume	Shoulder Season	Public	Private	Both
LEGEND															
- High Impact	●														
- Moderate Impact	○														
- No Impact															
ATTRACTIONS/EVENTS															
- Canadian Princess Resort (U)		○		●	○	●	●			○		●		●	
- MacMillan Island - Fishing Exhibit (U)	●			○	●	●	●	●	●	●	○	●	●		
- Logging Tours (U)					○	○		○		○				○	
- Fishermans Village (T)					●	●	●	●	●	●	○	●			●
- Underwater Marine Exhibit (T)					○	●	●	○	○	●	●	○	●		○
- Meares Island					○	○				○	○		○		
- Native Cultural Resort					○	●	●	○	○	●		○	○	●	
- Craft Festival and Exhibition (T)					●	○		○	○	●	○		●		
ACCOMMODATION															
- Expanded Campground (Pacific Rim National Park)					●	○		●		○	○		●		
- Upgrade Commercial Campgrounds (T)					●	○		●		○				●	
- Christie Residence (T)					●	○		○		○					●
- Coastal Destination Resort (T)	●			●	○	●	●	○	○	●		●			
- Nurses Residence Recycle (T)		○			●	○		○					●		
FOOD SERVICES															
- Fishermans Village Restaurant (T)		○		○	○	●				●		○		●	
ENTERTAINMENT															
- Little Theatre (U & T)		●			●	●			○	○					○
- Films (U & T)		○		○	●	○			○			○	○		
TRANSPORTATION															
- Instrument Landing Equipment Tofino Airport	○	●				○	●		●		○		○		
- Scheduled transportation between Ucluelet, National Park, Airport, Tofino		●		○		○	●	○			○		○		
HUMAN RESOURCE															
- Upgrading courses North Island College				○						○				○	

FIGURE 8

LAND/SEASCAPE UNIT DEVELOPMENT OPPORTUNITIES

- Alberni Inlet
- Sproat Lake/Kennedy River
- Mount Arrowsmith
- Great Central Lake/Stamp River

	SEASON				MARKETS			STRATEGY					SECTOR		
	Year round	Summer	Winter	Shoulder	Primary	Secondary	Tertiary	Length of Stay	Weather	Image/Theme	Volume	Shoulder Season	Public	Private	Both
LEGEND															
- High Impact	●														
- Moderate Impact	○														
- No Impact															
ATTRACTIONS															
- Harbourfront Development	●			○	●	○		●	○	○	○	●			●
- Mount Arrowsmith Ski Development			●		○			○							○
- Lady Rose II Cruise		●		●	○	○	○	●		●		○			
- Sprout Lake Water Park		○			○			○			○			○	
- Della Falls Trail System		●		○		○	●	○		○			○		
ACCOMMODATION															
- Municipal Campground-Port Alberni		●		○	○	○		○		○		○	○		
- Chupp Point Resort		○		○	○	○		○		○		○		●	
SERVICES															
- Harbourfront Restaurant		●		○	●	○		○		○		○		●	
- Ark Resort		●		○		○	○	○		○				○	
ENTERTAINMENT/PROGRAMS															
- Theatre performances throughout region		●			●	○		●			○				○
- Continued support of existing community events		●			●			●			○	○			○
- Promotion of Salmon Capital Theme		●			●	●	○	●		○	●				●
TRANSPORTATION															
- Staging area for bus/boat access to coast		●		○	●	●	○	●	○	○		○		●	
INFORMATION SERVICES															
- Regional Tourism information center		●		○	●	○	○	●	○	○		○	●		

FIGURE 8 (Cont'd)

LAND/SEASCAPE UNIT
DEVELOPMENT OPPORTUNITIES

- Barkley Sound
- West Coast Trail

	SEASON				MARKETS			STRATEGY					SECTOR		
	Year round	Summer	Winter	Shoulder	Primary	Secondary	Tertiary	Length of Stay	Weather	Image/Theme	Volume	Shoulder Season	Public	Private	Both
LEGEND															
- High Impact ●															
- Moderate Impact ○															
- No Impact															
ATTRACTION															
- Boardwalk Development (Bamfield)		●		○	○	○	○	●			○		●		
- Alternative Energy Display	●				○	○	○	○			○		●		
- Boat Cruise - Bamfield, Broken Group - Ucluelet		●		○	○	●	○	●		●	○	○		●	
- Recycle Church Camp Pachena Bay		●			○	○	○	○		●			●		
ACCOMMODATION															
- 100 Unit Campground Bamfield		●		○	●	○		●			○		●		
- Upgrade Campground Pachena Bay		●		○	●									○	
Indian Reserve #11		●						○		○					
- Season Accommodation Pachena Bay		●		○	○	●	○	●	○	●		○		○	
- Expand/Organize Campground at Torquot Bay		○			●			○		○			○		
- Primitive Campground Howard Point		○			●	○		○	○				○		
FOOD SERVICE															
- Boardwalk Cafe Bamfield		●			○	○	○	○	○	○				●	

FIGURE 8 (Cont'd)

11.0 CONCEPT

The overall development concept includes various images or themes of the Alberni-Clayoquot region and outlines the relationship and heirarchy of development opportunities.

The image must be a clear, simple reflection or representation of the region. It should feature a physical/activity motif that can be clearly understood by various tourism markets. The theme is a further simplication or translation of the image into a distinct statement that is readily identified with the region.

The development opportunities will be expressed as functional affiliations or a correlation of interdependent attractions, staging areas, service nodes and linkages. They will be given priority in terms of their importance to regional development. The development opportunities provide the foundation of the final development strategy for the Alberni-Clayoquot region.

11.1 IMAGE

The Alberni-Clayoquot Region is already characterized within and outside of the region by a series of abstract images that taken collectively, produce an overall theme for the region. These images are best expressed by the following labels or words.

- Wilderness coastline
- Pacific Rim
- Long Beach
- West Coast
- Pacific Coast
- Coastal fishing villages
- Coastal marine life
- Remoteness/solitude
- Forestry
- Salmon fishing
- Coastal rainforest
- Salt water fishing
- Commercial fishing
- Rugged seashore

There are also a number of frequently mentioned place names associated with the region, including Alberni, Ucluelet, Tofino, Barkley,

Broken Group and Clayoquot. These names are especially familiar to the primary markets and represent a particular image of the region. In order to be successful, an image projected by a region must respond to certain visitor needs. Images that relate to visitors needs are identified below:

(a) Distinctive

- reflects the unique natural and social character the region.
- presents a special quality that enables the region to be visible and separate from its competition.

(b) Exclusive

- features certain activities than can best be experienced in the region.
- appeals to the growing demand for individuality and special or personal activities.

(c) Attractive

- appeals to a wide variety of market segments.
- engages or tempts the prospective visitor with thoughts of a rewarding and self-fulfilling vacation.
- appeals to the markets' desire for a fascinating, enchanting, romantic or even idyllic holiday.

(d) Preferable

- influences the travellers' decision-making process by offering certain salient benefits.
- promotes those attributes of a region that rate of great importance to many travellers such as:
  "scenic beauty, hospitality, suitable accommodation, rest and relaxation."[1]

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[1]Johnathan N. Goodrich, "Benefit Bundle Analysis." An Empirical Analysis of International Travellers, Journal of Travel Research, Vol. 16 (Fall 1977) pp 6-9

The Alberni-Clayoquot Region unquestionably responds to each of these visitor needs by providing the following characteristics:

- its coastal resources and miles of accessible beach are unique to Canada.
- its combination of land-based activities and water-based activities offer opportunities that cannot be found in competive regions (West Coast Trail, Della Falls, etc.).
- the west coast atmosphere has features and facilities for a wide variety of markets (outdoor enthusiasts, campers, quality accommodation users, families, etc.).
- the region responds to most of the important demands of tourists.

The final image as expressed through the theme and finally marketed to the public must respond to these criteria.

11.2 THEME

The final theme for the Alberni-Clayoquot region must be a composite of both the image(s) it portrays and the visitor needs or preferences.

Since many of the images are similar they can be combined to give direction to the overall theme and finally the definition of the destination region. The following provides a number of themes that relates to the Alberni-Clayoquot region for the steering committee review.

Theme 1. West Coast Tourism Region

This theme respects the rugged, semi-wilderness seashore image and is general enough to relate to the entire Alberni-Clayoquot Region. Also "West Coast" is well known throughout most of the Canadian and American markets for its beaches, mountains, islands, tall trees and rainforest. It also can tie in with much of the existing Tourism B.C. Marketing efforts, especially where they are using coastal images such as Long Beach.

"West Coast", like "Pacific Coast", however, is rather general and can actually relate to any of the B.C. coastal settings. While the theme responds to the tourist need for an attractive and exciting environment, the images lack distinction and exclusiveness.

Theme II Long Beach Tourism Region

Long Beach obviously conjures up images of the coast but it relates more specifically to the incredible beaches which are a major draw to Alberni-Clayoquot. Like "West Coast", images of Long Beach depict attractiveness and are nature oriented. However, they tend to lack any distinctiveness and are not exclusive. Also, Long Beach is a rather common name and in fact, is the same name as a competing region in Washington State. For a region that has as much diversity as Alberni-Clayoquot, the Long Beach connotation is limited.

Theme III Pacific Rim Tourism Region

Pacific Rim reflects the name of the most important attraction to the region - Pacific Rim National Park. As a place name it is frequently used for commercial purposes within the region (Airlines, Charters, etc.). Considering the present level of National Park promotion, "Pacific Rim" is also the regional name that receives the most national and provincial publicity.

Both "Pacific" and "Rim" reflect coastline and seashore, and more specifically, west coast shoreline. The terms portray images that are attractive, and with respect to a tourism region also distinctive.

Use of "Pacific Rim", however, can be confusing, and while it is exclusive within the travel industry it is a label that frequently refers to all of the countries and economies that border on the Pacific Ocean. This may initially seem to be a negative feature, however, it may also create for the traveller (especially those outside the Pacific Northwest) a sense of the exotic that is associated with many of the Pacific Rim Countries.

The "Pacific Rim" title is a rather recent term and suggests new challenges, growth, economic links for Canada. It also implies new communication between the east and west parts of the world and between oriental and occidental philosophy. As such, this title will receive extensive use in the media over the next decade. The Alberni-Clayoquot Region with its three coastal communities and inland deep water port will play a part of that new economic order, so like "West Coast" or "Long Beach", "Pacific Rim" is already a part of its reality.

Finally the word "Rim" has great significance to many travellers as it denotes "edge" or "brink" or "limit". These words represent definite benefits to the more "allocentric" travellers or those interested in a remote destination on the fringe of the mass tourist flow. The allocentric person is active, adventurous and "prefers new and unusual destinations".[1] Alberni-Clayoquot has the resource base and the location to appeal to this type of market and experience.

While the three proposed themes structually refer to a definite Tourism Region they may take on more hype for promotional purposes. For instance the region may be referred to as:

- A Coastal Discovery
- The People Pleasin' Pacific Rim
- West Coast Country
- An Adventureous Alternative
- A Rugged Romance or
- A Chance to Savor the Solitude

All of these labels create images of discovery, challenge, excitement, primitive nature, solitude and remoteness. The theme will express these images and the concept will place priority on those development opportunities that support them.

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[1]Stanley Plog, "Why Destination Areas Rise and Fall in Popularity", Southern California Chapter of the Travel Research Association, 1977.

11.3 CONCEPT

The overall theme will suggest the orientation of the development concept. Emphasis will be placed on those locations, attractions and services that correspond to the resources, images and the needs of the visitor. The concept will outline in schematic or general terms the functional relationship between the:

1. Destination Areas, including;
   - service nodes (interior and coastal)
   - attractions (land and water based)
   - staging areas;

2. Linkages;
   Each function will be designated a primary, secondary or tertiary level role within the destination area.

Destination Areas are zones possessing opportunity to attract and hold tourists on their own unique features and facilities. They are usually centered on a particular hamlet but may include a large area around the community.

Service Nodes are concentrations of tourism services such as accommodation, restaurants, food outlets, arts and craft sales, etc. They will be located in both the interior as well as the coastal sections of the region.

Attractions are those natural and man-made features that serve to attract, hold and encourage repeat visitation. They will consist of building upon existing resources or developing new facilities. As well, they will express the character of the existing natural, social-cultural and lifestyle resources, they will be divided into land-based and water-based.

Staging Areas are points of departure for primary or secondary attractions and/or service nodes. Their services include transportation, information, supplies, orientation and travel services.

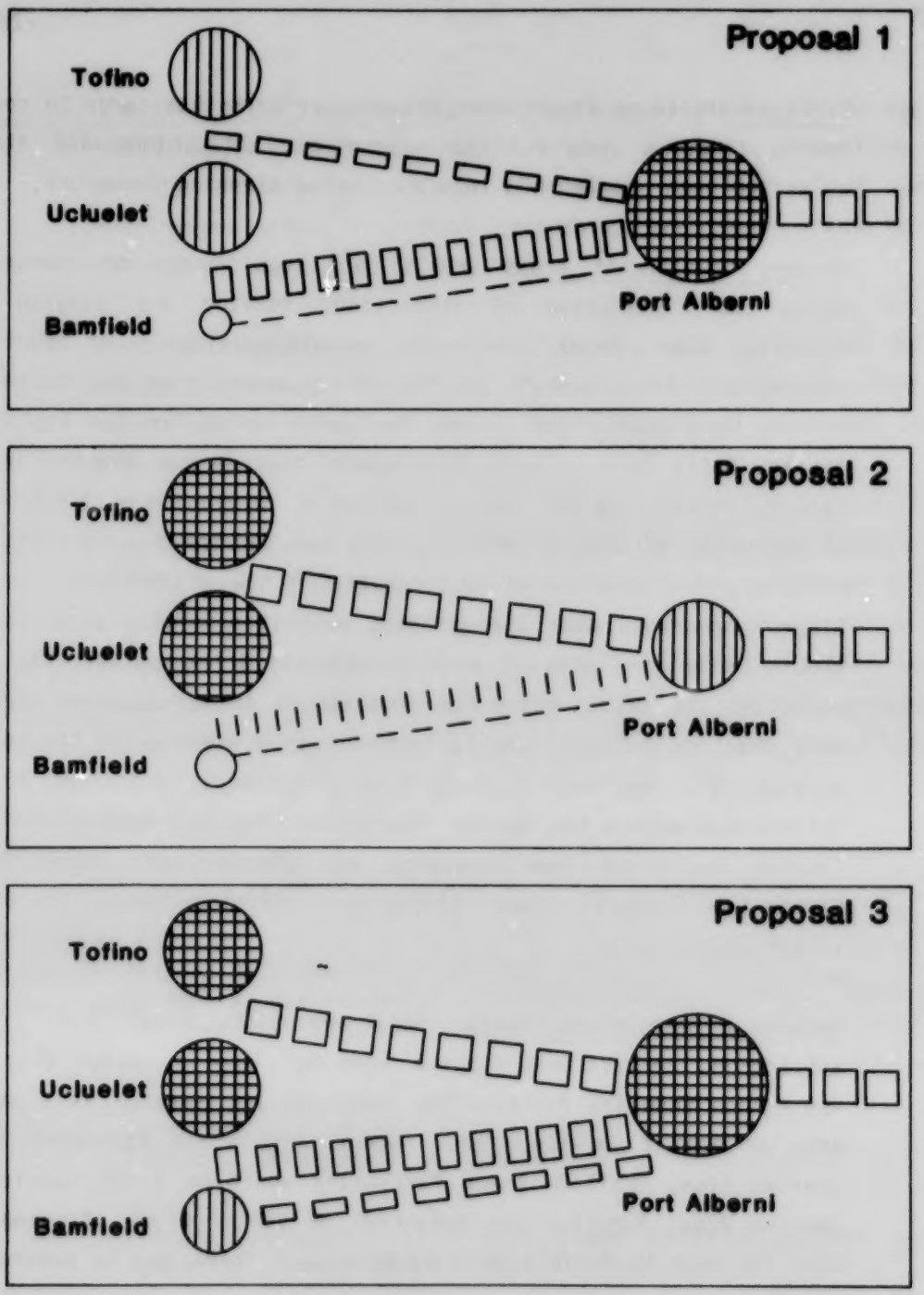

Figure 9
Optional Development Proposals

Linkages are those significant travel corridors that serve to connect the destination area and their services, attractions and staging nodes and incorporate them into a cohesive planning framework.

Primary Development Areas (PDA's) are those areas or communities where the combination of attraction, service and staging area functions play a major role in the overall development of tourism in the region. As an example the Victoria Area would be considered as a Primary Development Area in the Vancouver Island Tourism Region, or Niagara Falls is a Primary Development Area in the Niagara Tourism Region. Primary is not just a function of population size but rather of the areas ability to attract, hold and service the tourist. For instance, the development of significant new attractions, in Port Alberni, combined with its existing extensive service base and its growing role as a staging area for Alberni Inlet and Barkley Sound would classify it as a Primary Development Area. An area may have more than one but not usually beyond 2 or 3 PDA's. In the case of greater than one, each must take on a decidedly different role or orientation within the region. As an example, the Acadian Peninsula Tourism Region of New Brunswick was planned with three PDA's; Caraquet - Cultural theme, Shippagan - Fishing theme, Tracadie - Inland Waters theme.

Secondary Development Areas (SDA) are those areas that combine attraction, service and staging area but have a lesser degree of importance than the PDA's. They may also not service as a staging area or even a service area. Again, within the Vancouver Island tourism Area, Qualicum Beach Parksville would be a SDA lacking the immense draw, location and potential of Victoria yet offering more than the Port MacNeill - Port Hardy Area. There may be several SDA in any region.

Tertiary Development Area (TDA) have some attraction development potential but cannot necessarily respond with a significant level of service and/or staging are facilities. There are frequently numerous Tertiary Development Areas or sites any region.

The same primary, secondary and tertiary hierarchy can be applied to the linkages or corridors with primary corridors connecting various primary development area. Secondary corridors link secondary development areas or connect secondary development areas to primary development areas.

Three development concepts are proposed, each suggesting that Port Alberni, Ucluelet, Tofino and Bamfield are development nodes which are linked by three corridors - Route 4, Alberni Inlet and the Port Alberni/Bamfield road.

The major difference between the various concepts lies largely in the definition of Port Alberni, Tofino and Ucluelet as either a primary or secondary level development node, and Bamfield as either a secondary or tertiary node. The remainder of the region would be designated a function based on the scale or the role proposed for these major municipalities.

Each proposed development concept is outlined below and illustrated in Figure 9.

Proposal 1
- Primary Development - Port Alberni
- Secondary Development - Ucluelet/Tofino
- Tertiary Development - Bamfield

Proposal 2
- Primary Development - Ucluelet/Tofino
- Secondary Development - Port Alberni
- Tertiary Development - Bamfield

Proposal 3
- Primary Development - Port Alberni/Ucluelet/Tofino
- Secondary Development - Bamfield

11.3.1 Alternative Concept I

Overview

A case can be made for making Port Alberni the primary location for tourism development. This City has the largest supply of tourism

services (accommodation, restaurants) and is unquestionably a major staging area for the region. Although it lacks major natural and man-made attractions, existing and proposed features could be combined with those of the surrounding area, including Sproat Lake, Mt. Arrowsmith, Alberni Inlet, etc.

The components of this concept would be as follows:

Service Nodes
- Primary - Port Alberni
- Secondary - Ucluelet/Tofino
- Tertiary - Bamfield

Attractions
- Primary - Port Alberni (interior)/Pacific Rim National Park (coastal)
- Secondary - Ucluelet/Tofino(coastal)
- Tertiary - Bamfield

Staging Areas
- Primary - Port Alberni
- Secondary - Ucluelet/Tofino
- Tertiary - Bamfield

Linkages
- Primary - Route 4/Alberni Inlet
- Secondary - Port Alberni - Bamfield Rd.

11.3.2 Alternative Concept II

Alternative Concept II is based on the assumption that Pacific Rim National Park and the coastal resources of the Ucluelet and Estowista Pennsula are the major draw to the region. Therefore, Ucluelet and Tofino would form the primary development areas. Port Alberni, despite its existing large supply of services, would only receive

secondary development status and would not be considered as a major attraction in the area. As well, with Port Alberni playing a secondary staging area role, the Alberni Inlet would become a secondary access corridor to the primary resources of the coast.

While this concept reflects certain realities of the present market conditions and existing tourism activities, it is as best short term in its perspective.

The concept would be outlined as follows:

Services
- Primary - Ucluelet/Tofino
- Secondary - Port Alberni
- Tertiary - Bamfield

Attractions
- Primary - Ucluelet/Pacific Rim National Park/Tofino
- Secondary - Port Alberni - Waterfront/Sproat Lake, Mt. Arrowsmith/ Alberni Inlet

Tertiary - Bamfield

Staging Area
- Primary - Ucluelet (Barkley Sound)/Tofino (Clayoquot Sound)
- Secondary - Port Alberni - Alberni Inlet, (Della Falls, Sproat Lake, Mount Arrowsmith)

Tertiary - Bamfield - (Barkley Sound)/Toquart Bay (Barkley Sound)

Linkages
- Primary - Route #4
- Secondary - Alberni Inlet
- Tertiary - Port Alberni - Bamfield Route/Lake Cowichan

11.3.3 Alternative Concept III

The third alternative concept expresses in part the orientation of the previous two. However, it is more equitable in its balance of development throughout the interior and coastal components of the region. As well, it respects the interdependence of what the Organization of American States identifies as the "socio-ecology"[1] of a region which means equal expression for the major social-cultural and natural resource base. The concept is also long term in approach and has what Clare Gunn calls "that built-in creativity that can become sets of guidelines for future developments and that meet both the goals and objectives for regional strategic planning."[2]

Alternative Concept III calls for primary development in both Port Alberni (interior) and Ucluelet/Tofino (coastal) with Bamfield receiving secondary level developments. The concept promotes cohesion and fosters compatibily between the various development nodes and land/seascape units and yet appreciates the differences.

Concept III is expressed as follows:

11.3.3.1 Service Nodes

Primary Service Node (Interior)

Port Alberni will be promoted as a primary service node because of the services and attractions available at Harbourfront. It also has a large accommodation and restaurant sector which will serve Port Alberni, the surrounding area as well as accept all overflow from the coastal area.

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[1]Anzola - Butancort, Ricardo "The Technology of Tourism Development," Cornell H.R.A. Quarterly, Vol. 15, No. 3 (November, 1974)

[2]Gunn Clare, "Tourism Planning", Crane Russak, New York, 1981

Primary Service Nodes (Coastal)

Both Ucluelet and Tofino will serve as primary nodes on either side of Pacific Rim National Park. They will have a complete mix of accommodation, information and food services.

Secondary Service Nodes (Interior)

They will be located at Sproat Lake and Great Central and include accommodation and some food services.

Secondary Service Nodes (Coastal)

Bamfield will provide all services to the south side of Barkley Sound.

11.3.3.2 Attractions

Primary Attractions

Land Based

Long Beach (Pacific Rim National Park) will continue to be promoted as the prime natural destination. The Park will also be supported by primary man-made attractions to be developed in Tofino and Ucluelet.

Water Based

Barkley Sound with its protected ocean environment, will continue to be the most popular area for a full range of boating, fishing and diving activities.

Secondary Attractions

Land Based

Port Alberni Harbourfront (urban) and the West Coast Trail (wilderness) will be secondary attractions. Both have an equal opportunity

to increase the length of stay and attract visitors in the shoulder season. Port Alberni also has the largest supply of evening entertaining facilities.

Water Based

Alberni Inlet is an attraction and a major access to the Broken Group. Its opportunity for fishing, cruising and diving will be developed. It also supports the development of Port Alberni Harbourfront as a significant attraction.

Clayoquot Sound is readily accessible from Tofino and includes many natural attractions including the Hot Springs, Meares Island, Clayoquot Island and the calm waters of the Sound.

Tertiary Attractions

Land Based

Della Falls presents an excellent opportunity to promote a very unique feature that lends credibility to the "nature" theme.

The Community of Bamfield, with its charming coastal character and interesting board walk is also a tertiary attraction.

Water Based

The various attractions present potential for camping, boating, swimming and fishing. They include Kennedy Lake, Sproat Lake and Great Central Lake.

11.3.3.3 Staging Areas

Primary Staging Area (interior)

Port Alberni is a staging area for the entire region including the Greater Port Alberni area. As such, it will provide automobile/bus

access, via Route 4, to the primary land attractions (Pacific Rim National Park, Ucluelet and Tofino), and water access, via Alberni Inlet to the primary water attractions. (Barkley Sound and Broken Group Islands).

Secondary Staging Areas

Bamfield will be developed as a second level access to Barkley Sound the Deer Group and the Westcoast Trail.

Primary Staging Areas (coastal)

Tofino is a staging area for the new attractions and services of Clayoquot Sound.

Ucluelet will continue to be promoted as the main coastal access to Barkley Sound and the Broken Group.

11.3.3.4 Linkages

Primary Linkages

Route 4 along the Kennedy River is the primary land based link to the primary land attractions, while the Alberni Inlet provides primary water link to the primary water based attractions. The integration of the two will create a primary circuit.

Secondary Linkages

Secondary land corridors link Port Alberni with Bamfield. Secondary water based corridors connect Bamfield with Ucluelet, and Tofino with the various resources of Clayoquot Sound.

Tertiary Linkages

The land corridors connect such features as Kennedy Lake, Sproat Lake, Great Central Lake, Toquart Bay, Poetts Nook, Sarita, Stamp Falls, and Mount Arrowsmith with the major service nodes or primary and secondary corridors.

APPENDIX I

TEMPERATURE AND PRECIPITATION DATA[1]

AMPHITRITE POINT 48° 55'N 125° 32'W 11 m	J	F	M	A	M	J	J	A	S	O	N	D	YEAR
Daily Maximum Temperature	8.9	8.5	9.3	11.2	13.5	15.4	17.0	17.2	16.4	13.3	9.9	7.7	12.2
Daily Minimum Temperature	2.3	3.5	3.2	4.8	7.1	9.3	10.9	11.4	10.3	8.0	4.8	3.3	6.6
Daily Temperature	4.7	6.1	6.2	8.0	10.4	12.4	13.9	14.3	13.4	10.6	7.4	5.5	9.4
Standard Deviation, Daily Temperature	1.4	1.3	0.9	0.8	0.8	0.9	0.7	0.7	1.0	0.8	1.1	1.5	0.5
Extreme Maximum Temperature	12.8	17.2	16.1	20.6	23.3	25.0	28.9	27.2	24.4	20.6	20.6	15.0	28.9
Years of Record	20	20	21	21	20	20	20	20	20	20	20	20	
Extreme Minimum Temperature	-7.2	-4.4	-2.8	-0.6	1.1	3.9	6.1	7.2	2.8	-0.6	-3.3	-11.7	-11.7
Years of Record	20	20	21	21	20	20	20	20	20	20	20	20	
Rainfall	393.1	344.2	338.1	203.5	130.0	92.1	72.6	113.1	161.0	358.1	383.6	440.3	3040.7
Snowfall	14.5	3.1	4.5	0.8	0.0	0.0	0.0	0.0	0.0	0.0	2.2	11.4	36.5
Total Precipitation	407.6	347.3	342.6	204.3	130.0	92.1	72.6	113.1	161.0	358.1	385.8	451.7	3077.3
Standard Deviation, Total Precipitation	169.0	154.0	131.6	79.2	63.3	46.6	70.4	79.2	78.4	166.1	128.0	125.3	402.6
Greatest Rainfall in 24 hours	138.2	118.9	117.6	66.5	67.3	38.4	109.5	86.9	75.9	121.9	110.2	155.4	155.4
Years of Record	23	23	23	23	21	22	22	22	22	22	21	22	
Greatest Snowfall in 24 hours	20.3	12.7	19.1	8.1	T	0.0	0.0	0.0	0.0	T	10.9	22.9	22.9
Years of Record	23	23	23	23	22	22	22	22	22	22	21	21	
Greatest Precipitation in 24 hours	138.2	118.9	117.6	66.5	67.3	38.4	109.5	86.9	75.9	121.9	110.2	155.4	155.4
Years of Record	23	23	23	23	21	22	22	22	22	22	21	22	
Days with Rain	20	19	19	17	14	11	9	12	12	19	21	22	196
Days with Snow	2	1	1	*	0	0	0	0	0	0	*	2	6
Days with Precipitation	21	19	19	17	14	11	9	12	12	19	21	23	197
TOFINO A 49° 5'N 125° 46'W 20 m													
Daily Maximum Temperature	8.7	8.5	9.0	10.9	13.7	16.1	18.3	18.1	17.2	13.4	9.8	7.7	12.6
Daily Minimum Temperature	0.8	2.0	1.9	3.5	5.9	8.5	10.2	10.7	9.0	6.4	3.4	2.1	5.4
Daily Temperature	3.8	5.3	5.5	7.2	9.9	12.4	14.3	14.4	13.1	9.9	6.6	4.9	8.9
Standard Deviation, Daily Temperature	1.5	1.3	0.9	0.8	0.8	1.0	0.7	0.9	1.1	0.9	1.1	1.7	0.5
Extreme Maximum Temperature	14.4	16.9	16.3	21.7	25.6	32.2	32.8	31.3	29.4	23.9	21.1	15.6	32.8
Years of Record	25	24	25	24	25	25	26	26	26	25	25	26	
Extreme Minimum Temperature	-15.0	-7.2	-6.0	-1.7	0.0	2.2	3.9	4.4	-0.6	-2.2	-7.0	-12.2	-15.0
Years of Record	25	25	25	24	24	25	26	26	25	25	25	26	
Rainfall	382.7	357.3	381.2	231.4	143.0	101.7	86.1	114.1	183.2	381.8	429.3	484.2	3238.0
Snowfall	20.5	6.0	8.6	2.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	13.2	53.0
Total Precipitation	404.3	366.4	372.4	233.9	143.9	101.7	86.1	114.1	183.2	381.8	432.3	479.2	3288.3
Standard Deviation, Total Precipitation	159.2	170.0	148.0	94.0	73.0	49.4	71.2	89.2	77.4	204.3	143.9	146.7	412.5
Greatest Rainfall in 24 hours	174.2	128.5	169.7	106.2	96.5	51.3	99.3	131.3	105.9	154.2	155.4	166.4	174.2
Years of Record	26	26	26	26	26	26	26	26	26	25	26	27	
Greatest Snowfall in 24 hours	31.2	10.7	20.3	14.2	T	0.0	0.0	0.0	0.0	0.0	22.8	15.5	31.2
Years of Record	26	26	26	26	26	26	26	26	26	26	25	27	
Greatest Precipitation in 24 hours	174.2	128.5	169.7	106.2	96.5	51.3	99.3	131.3	105.9	154.2	155.4	166.4	174.2
Years of Record	26	26	26	26	26	26	26	26	26	25	26	27	
Days with Rain	20	18	19	18	13	11	9	11	13	19	22	22	196
Days with Snow	4	2	2	1	0	0	0	0	0	0	1	3	13
Days with Precipitation	21	19	20	18	13	11	9	11	13	19	22	23	199
BAMFIELD EAST 48° 50'N 125° 7'W 4 m													
Daily Maximum Temperature	8.9	8.9	9.5	11.2	13.8	15.7	17.8	17.9	17.4	14.0	10.1	7.7	12.5
Daily Minimum Temperature	1.0	2.2	2.0	3.7	6.2	8.8	10.4	10.7	9.0	6.5	3.6	2.2	5.6
Daily Temperature	4.9	5.6	5.8	7.5	9.9	12.2	14.0	14.3	13.2	10.3	6.8	5.0	9.1
Standard Deviation, Daily Temperature	1.4	1.2	0.9	0.9	0.8	1.0	0.8	0.8	1.1	0.8	1.0	1.4	0.4
Extreme Maximum Temperature	14.4	19.4	21.7	23.4	30.6	32.8	31.7	30.0	30.6	23.3	20.0	16.1	32.8
Years of Record	21	21	21	21	21	21	21	22	22	22	22	22	
Extreme Minimum Temperature	-9.4	-6.1	-3.9	-2.2	-0.8	2.2	4.4	4.0	0.0	-2.8	-4.4	-10.6	-10.6
Years of Record	21	21	21	21	21	21	21	22	22	22	22	22	
Rainfall	360.0	329.0	326.4	191.5	129.1	74.7	62.1	98.3	133.2	334.4	386.3	428.7	2853.7
Snowfall	12.2	1.5	2.3	T	0.0	0.0	0.0	0.0	0.0	0.0	0.8	8.4	25.2
Total Precipitation	372.2	330.5	328.7	191.5	129.1	74.7	62.1	98.3	133.2	334.4	387.1	437.0	2878.8
Standard Deviation, Total Precipitation	160.4	155.3	127.7	80.0	67.9	38.0	54.6	72.2	69.6	160.9	138.4	130.0	396.8
Greatest Rainfall in 24 hours	141.7	98.6	101.6	72.6	71.6	43.9	138.4	82.2	81.5	166.9	117.6	123.2	166.9
Years of Record	21	21	21	21	21	21	21	21	21	22	22	22	
Greatest Snowfall in 24 hours	16.5	7.6	12.7	T	0.0	0.0	0.0	0.0	0.0	0.0	8.4	22.9	22.9
Years of Record	21	21	21	21	21	21	21	21	22	22	22	22	
Greatest Precipitation in 24 hours	141.7	98.6	101.6	72.6	71.6	43.9	138.4	82.2	81.5	166.9	117.6	123.2	166.9
Years of Record	21	21	21	21	21	21	21	21	21	22	22	22	
Days with Rain	20	19	19	17	14	10	8	10	11	18	21	22	189
Days with Snow	3	*	1	0	0	0	0	0	0	0	*	2	6
Days with Precipitation	21	19	20	17	14	10	8	10	11	18	22	23	195

APPENDIX I

TEMPERATURE AND PRECIPITATION DATA[1] (Cont'd)

PORT ALBERNI A 49° 15'N 124° 50'W 2 m	J	F	M	A	M	J	J	A	S	O	N	D	YEAR
Daily Maximum Temperature	3.5	6.8	9.7	13.4	17.4	20.4	24.3	24.9	20.6	14.7	7.7	5.0	14.0
Daily Minimum Temperature	-1.5	0.0	0.0	2.2	5.1	8.6	10.1	10.5	7.9	5.1	2.2	0.2	4.2
Daily Temperature	1.2	3.7	5.1	8.1	11.7	14.8	17.4	17.9	14.7	10.1	5.1	2.7	9.4
Standard Deviation, Daily Temperature	1.1	1.4	1.1	0.9	0.9	1.1	1.2	1.2	1.2	0.9	1.4	1.9	0.4
Extreme Maximum Temperature	13.3	15.6	21.7	26.1	30.0	33.5	36.1	36.4	33.9	25.6	17.2	15.6	36.4
Years of Record	11	11	11	11	11	11	11	11	11	11	12	12	
Extreme Minimum Temperature	-14.6	-13.3	-9.4	-6.1	-2.8	0.0	2.2	1.1	-3.3	-6.0	-8.9	-14.5	-14.6
Years of Record	11	11	11	11	11	11	11	11	11	11	12	12	
Rainfall	209.2	216.5	170.3	90.5	50.1	36.2	23.8	38.6	90.3	194.1	280.9	288.3	1688.8
Snowfall	60.4	25.7	12.4	1.1	0.0	0.0	0.0	0.0	0.0	0.0	7.1	28.5	135.2
Total Precipitation	279.8	248.3	188.7	92.5	50.1	36.2	23.8	38.6	90.3	194.1	288.7	321.4	1883.5
Standard Deviation, Total Precipitation	118.9	103.5	97.7	48.4	36.5	30.5	20.1	41.5	47.5	141.8	138.3	120.1	294.7
Greatest Rainfall in 24 hours	98.6	75.9	93.2	46.7	49.0	48.2	37.3	29.7	58.4	78.5	74.7	111.0	111.0
Years of Record	11	11	11	11	11	11	11	11	11	11	12	12	
Greatest Snowfall in 24 hours	63.0	32.3	41.1	5.8	0.0	0.0	0.0	0.0	0.0	T	19.0	38.4	63.0
Years of Record	11	11	11	11	11	11	11	11	11	11	12	12	
Greatest Precipitation in 24 hours	98.6	87.8	93.2	46.7	49.0	48.2	37.3	29.7	58.4	78.5	74.7	111.0	111.0
Years of Record	11	11	11	11	11	11	11	11	11	11	12	12	
Days with Rain	16	17	18	14	13	10	6	6	11	17	19	19	166
Days with Snow	5	3	3	1	0	0	0	0	0	0	2	4	21
Days with Precipitation	21	18	18	14	13	10	6	6	11	17	19	21	176

[1]SOURCE: Environment Canada 1981. Canadian Climate Normals Temperature and Precipitation 1951-1980. Atmospheric and Environment Service.

INVENTORY OF TOURISM FACILITIES

TOFINO

ACCOMODATION	NUMBER OF UNITS	HOUSE KEEPING	SWIMMING POOL	BAR/ LOUNGE	RESTAURANT	CONFERENCE/ BANQUET	SEASONAL YEAR-ROUND	RATING
CRYSTAL COVE CAMPSITE	25CS, 25TS						S	*
PACIFIC RIM CAMPGROUND	400CS, 114TS						S	*
PACIFIC RIM NATIONAL PARK:								
GREEN POINT CAMPGROUND	92CS						S	****
SCHOONER CAMPGROUND	100CS						S	****
APALOMA MOTEL	36U	*			*		Y-R	*
DOLPHIN MOTEL	13U	*					Y-R	***
MAQUINA MOTEL	41U			*	*		Y-R	**
MINI MOTEL	5U	*					Y-R	****
SCHOONER INN	8U	*			*		Y-R	****
CLAYOQUOT LODGE	9U			*	*		S	*****
DUFFIN COVE SEASIDE RESORT	12U	*					Y-R	****
MACKENZIE BEACH RESORT	4CS, 14TS, 12U	*					S	***
OCEAN VILLAGE BEACH RESORT	48U	*	*				Y-R	*****
PACIFIC SANDS RESORT	41U	*					Y-R	*****

RESTAURANTS	FAMILY	FASTFOOD	RATING
APALOMA MOTOR INN	*		**
CLAYOQUOT LODGE	*		*****
HAPPY HARRY'S	*		***
LUM HONG RESTAURANT	*		**
LOFT	*		*****
SCHOONER RESTAURANT	*		*****

ATTRACTIONS	SEASONAL	YEAR-ROUND	TYPE	MARKET	ATTRACTIVITY	RATING	ATTENDANCE
HOT SPRINGS COVE		*	NAT	FAMILY	LOC-REG-PROV	****	N/A
TOFINO MARITIME MUSEUM		*	HIST	FAMILY	LOC-PROV	**	N/A
TONQUIN PARK		*	NAT	FAMILY	LOC	**	N/A
PACIFIC RIM NATIONAL PARK LONG BEACH		*	NAT	FAMILY	LOC-REG-PROV-NAT-US-INT	*****	500,000 (EST)

TRANSPORTATION	SCHEDULED STOPS
ORIENT STAGE LINES	TOFINO-UCLUELET-PORT ALBERNI
PACIFIC RIM AIR LINES	TOFINO-PORT ALBERNI-VANCOUVER
CHARTERS	
MAVERICK COACH LINES	VANCOUVER-PORT ALBERNI-VANCOUVER

SERVICES	SEASONAL	YEAR-ROUND	MARKET
BOAT CHARTERS			
NOAH'S ARK BOAT RENTALS		*	FAMILY
SAFARI 2		*	FAMILY
WHITE WATER ADVENTURES		*	FAMILY
CRAFT SHOPS			
EAGLE DANCER GALLERY		*	FAMILY
ISLANDER GIFT GALLERY	*		FAMILY
WEST COAST GIFT SHOP	*		FAMILY
NISS-MAHS STORE (ESOWISTA RESERVE)	*		FAMILY
TOFINO CONSUMERS CO-OP		*	FAMILY

UCLUELET

ACCOMODATION	NUMBER OF UNITS	HOUSE KEEPING	SWIMMING POOL	BAR/ LOUNGE	RESTAURANT	CONFERENCE/ BANQUET	SEASONAL YEAR-ROUND	RATING
BAY SHORE TRAILER PARK	10TS						S	**
CANADIAN PRINCESS	30U			*	*		Y-R	****
LITTLE BEACH RESORT	18U	*					S	***
UCLUELET LODGE HOTEL	21U			*	*		Y-R	**
PACIFIC RIM MOTEL	40U	*					Y-R	****
PENINSULA MOTOR INN	20U	*					Y-R	***
SEA SIDE MOTEL	15U	*					Y-R	***
THORNTON MOTEL	19U	*			*		Y-R	****
WEST COAST MOTEL	18U	*	*				Y-R	***

RESTAURANTS	FASTFOOD	FAMILY	RATING
CANADIAN PRINCESS		*	****
PENNINSULA MOTOR INN & REST.		*	***
SCHOONER RESTAURANT		*	***
THE WICK		*	****
THORNTON MOTEL		*	***
UCLUELET LODGE HOTEL (PISCES)		*	**
WHALE'S TALE SEAFOOD REST.		*	*****

ATTRACTIONS	SEASONAL	YEAR-ROUND	TYPE	MARKET	ATTRACTIVITY	RATING
AMPHRITE POINT		*	NAT	FAMILY	REG-PROV	**
HE-TIN-KIS PARK		*	NAT	FAMILY	LOC	*
FRASER GARDENS		*	HIST	FAMILY	LOC	*
MACMILLAN BLOEDEL TREE PLANTATION		*	IND	ADULT	LOC-REG	**
PACIFIC RIM NATIONAL PARK: BROKEN GROUP ISLANDS		*	NAT	FAMILY	LOC-REG-PROV-NAT-US-INT	*****
COAST GUARD T.M.C.		*	S-C	ADULT	LOC-REG-PROV	**
CENTRAL NATIVE FISHERMAN'S CO-OP		*	IND	ADULT	LOC	*

SPECIAL EVENTS	DATE	LENGTH	TYPE	MARKET	ATTRACTIVITY
UKEE DAYS	AUG	WK-END	M-M	FAMILY	LOC-REG

SERVICES	SEASONAL	YEAR-ROUND	MARKET
BOAT CHARTERS			
BAYSHORE MARINA	*		FAMILY
CANADIAN PRINCESS-ADVENTURES	*		FAMILY
PACIFIC WEST TRAVEL/CHARTER		*	FAMILY
ROSAL MARINE CHARTERS		*	FAMILY
SUNCOAST VENTURES LTD.		*	FAMILY
PATS CAMERA & SPORTING GOODS		*	FAMILY
SOUVENIRS			
DA-QUAH GALLERY		*	FAMILY
TREASURE CHEST		*	FAMILY
THE WINDFISH		*	FAMILY

PORT ALBERNI AND AREA

ACCOMODATION	NUMBER OF UNITS	WITH KITCHEN	SWIMMING POOL	BAR/ LOUNGE	RESTAURANT	CONFERENCE/ BANQUET	SEASONAL YEAR-ROUND	RATING
THE ARK RESORT	15CS						S	**
CHINA CREEK	205CS						S	****
DRY CREEK PARK PUBLIC CAMPGROUND	30CS						S	***
LAKESHORE CAMPGROUND	14CS, 8TS, 1U						S	****
SPROAT LAKE PARK	69CS						S	***
STAMP FALLS PARK	20CS						S	***
BLUEBIRD MOTOR INN	19U	*					Y-R	***
ESTA VILLA MOTEL	14U	*					Y-R	***
HARBOUR WAY MOTEL	24U	*					Y-R	***
MAPLES MOTEL RESORT	3TS, 10U						Y-R	****
SOMASS AUTO COURT & MOTEL	1TS, 14U	*	*				Y-R	***
REDFORD MOTOR INN	10CS, 10TS, 30U	*			*		Y-R	***
SUNSET MOTEL	10U	*					Y-R	***
TIDEBROOK MOTEL	16U	*			*		Y-R	****
TIMBER LODGE MOTOR INN	22U	*	*		*		Y-R	*****
TYEE VILLAGE MOTEL	53U	*	*		*	*	Y-R	****
BEAUFORT HOTEL	53U			*	*	*	Y-R	***
GREENWOOD MOTOR HOTEL	50U			*	*	*	Y-R	****
HOSPITALITY INN	50U			*	*	*	Y-R	*****
RODEWAY INN BARCLAY PACIFIC	88U		*	*	*	*	Y-R	****
SOMASS HOTEL				*	*		Y-R	***
WEST BAY HOTEL	18U			*	*		Y-R	***

RESTAURANTS	FASTFOOD	FAMILY	RATING
ARLINGTON HOTEL CAFE		*	**
BEAUFORT HOTEL (REST. & CAFE)		*	**
CHOPSTICK HOUSE		*	**
DIMITRI'S PIZZA STEAK		*	**
FRIAR JOHN'S FISH & CHIPS	*		***
GALAXY RESTAURANT		*	****
GLEN'S FABULOUS SANDWICHES	*		**
GOLDEN DRAGON RESTAURANT		*	***
THE HARVEST RESTAURANT		*	***
LANTERN INN		*	**
LA RUE'S SEAFOOD GALLERY		*	***
LITTLE BAVARIA RESTAURANT		*	*****
LITTLE VILLA RESTAURANT		*	*****
MCDONALD'S RESTAURANT	*		***
MR. MIKE'S STEAK HOUSE		*	***
PAPA CHARLIE'S		*	*****
PHOENIX TERRACE		*	**
SAWMILL ROOM (SOMASS HOTEL)		*	***
SMITTY'S PANCAKE HOUSE		*	***
SOLDA'S RESTAURANT		*	***
TIMBERLODGE MOTOR INN		*	*****
TYEE VILLAGE RESTAURANT		*	****
LAKESIDE ROOM (WEST BAY MOTEL)		*	****
BARKLAY PACIFIC (RESTAURANT)		*	****
CANAL RESTAURANT		*	****

ATTRACTIONS	SEASONAL	YEAR-ROUND	TYPE	MARKET	ATTRACTIVITY	RATING	ATTENDANCE
CULTURAL/HISTORICAL/EDUCATIONAL							
ALBERNI VALLEY MUSEUM		*	HIST	FAMILY	LOC-REG-PROV	*****	35,270 (1983)
CATHEDRAL GROVE (MACMILLAN PARK)		*	NAT	FAMILY	PROV-NAT-US	*****	
CITY HALL		*	S-C	FAMILY	LOC	**	
HARBOUR TOURS			S-C	FAMILY	REG-PROV	***	
J.V.CLYNE BIRD SANCTUARY		*	NAT	FAMILY	REG-PROV	****	
LIBRARY		*	S-C	FAMILY	LOC	*	
LOGGING LOCOMOTIVE		*	HIST	FAMILY	LOC-REG	**	
MILL TOURS		*	IND	FAMILY	REG-PROV	***	
ROBERTSON CREEK HATCHERY		*	IND	FAMILY	PROV-NAT	****	4,826 (EST)
ROLLIN ART CENTRE	*		S-C	FAMILY	REG-PROV	****	7,210 (1983)
RECREATIONAL							
COMMERCIAL							
ARCHERY,RIFLE,TRAP,& PISTOL RANGE		*	REC	ADULT	LOC	*	
BOAT CHARTERS/DIVING							
ACTION CHARTERS	*		REC	FAMILY	LOC-REG-PROV	**	
ALBERNI BARCLAY CHARTERS	*		REC	FAMILY	LOC-REG-PROV	***	
ALBERNI DIVERS LTD.		*	REC	ADULT	LOC-REG-PROV	***	
ALBERNI SALMON CHARTERS ASSOC	*		REC	FAMILY	LOC-REG-PROV	***	
GRANT'S GUN & TACKLE	*		REC	FAMILY	LOC-REG-PROV	***	
HILLSIDE RESORT	*		REC	FAMILY	LOC-REG-PROV	***	
RENDEZVOUS DIVE CHARTERS		*	REC	ADULT	LOC-REG-PROV	*****	
ECHO AQUATIC CENTRE		*	REC	FAMILY	LOC	***	
ECHO'67 COMMUNITY CENTRE		*	REC	FAMILY	LOC	***	
GOLF COURSES							
ALBERNI GOLF CLUB		*	REC	ADULT	REG	****	
PLEASANT VALLEY GOLF COURSE		*	REC	FAMILY	REG	**	
LADY ROSE CRUISE		*	S-C	FAMILY	LOC-REG-PROV-NAT-US-NAT	*****	10,000 (1983)
McCULLY AVIATION (TOURS)		*	IND	FAMILY	PROV	***	
MARINAS BERTHS							
CHINA CREEK MARINA 197		*	REC	FAMILY	LOC-REG-PROV	*****	
CLUTESI HAVEN MARINA 120		*	REC	FAMILY	LOC-REG-PROV	*****	
PORT ALBERNI MARINA 20		*	REC	FAMILY	LOC-REG-PROV	***	
HUNTERS MARINA 50		*	REC	FAMILY	LOC-REG-PROV	**	
MT. ARROWSMITH SKI CENTRE	*		REC	FAMILY	LOC-REG	**	12,400 (79-80)
PARKS AND TRAILS							
CHINA CREEK TRAIL		*	NAT	FAMILY	LOC	***	
CHINA CREEK PARK							1,829 PARTIES
DELLA FALLS		*	NAT	FAMILY	PROV-NAT-INT	*****	
DICKSON FALLS		*	NAT	FAMILY	PROV	**	
FISHERMANS TRAIL-UPPER STAMP R.		*	NAT	FAMILY	LOC-REG	**	
THE GRAD		*	NAT	FAMILY	LOC	**	
HORNE LAKE TRAILS		*	NAT	FAMILY	LOC-REG	***	
MT. ARROWSMITH REGIONAL PARK		*	NAT	FAMILY	LOC-REG-PROV	****	
PAPER MILL DAM PARK		*	NAT	FAMILY	LOC-REG-PROV	**	
RECREATIONAL PARK		*	NAT	FAMILY	LOC-REG-PROV	*	

RIVER ROAD PARK		*	NAT	FAMILY	LOC-REG-PROV	*	
RODGER CREEK TRAIL		*	NAT	FAMILY	LOC	**	
SPROAT LAKE PROVINCIAL PARK		*	NAT	FAMILY	LOC-REG-PROV	****	CA 14,068 DU 95,396
STAMP FALLS PROVINCIAL PARK		*	NAT	FAMILY	LOC-REG-PROV	****	CA 5,642 DU 34,724
STRATHCONA PARK		*	NAT	FAMILY	LOC-REG-PROV	****	CA 18,714 DU 31,070
NATURAL AREAS							
ALBERNI INLET		*	NAT	FAMILY	LOC-REG-PROV-NAT-US	*****	
GREAT CENTRAL LAKE		*	NAT	FAMILY	LOC-REG-PROV	***	
LOGGING ROADS (WOODS ACCESS)	*		REC	FAMILY	LOC-REG	**	

SPECIAL EVENTS	DATE	LENGTH	TYPE
ALBERNI DISTRICT FALL FAIR	SEPT	WK	S-C
ALBERNI VALLEY HOCKEY JAMBOREE	JAN	1 DAY	REC
ANNUAL HIGHLAND DANCE MEET	JUNE	1 DAY	S-C
ANNUAL QUARTERHORSE SHOW	JUNE	WK-END	REC
ANNUAL WESTCOAST GOLF TOURNAMENT	JUNE	WK	REC
B.C. SOCCER SCHOOL	JUL-AU	2 MONTHS	REC
BIKE RODEO	JULY	1 DAY	REC
CRAFTSFAIR	JUNE	WK	S-C
DOG SHOW	OCT	3 DAYS	S-C
FOLKFEST	JULY	1 DAY	S-C
FRONTIER DAYS-RODEO	JULY	2 DAYS	REC
GRAPE FESTIVAL	SEPT	1 DAY	S-C
LIONS CLUB COMMUNITY HALLOWEEN PARTY	OCT 31	1 DAY	S-C
LOGGERS SPORTS DAY	MAY	WK-END	REC
MINOR SOFTBALL DAY	JUNE	2 DAY	REC
OCTOBERFEST	OCT	1 DAY	S-C
PARKS & RECREATION SUMMER PROGRAM	JUL-AU	2 MONTHS	REC
PORT ALBERNI THEATRICAL SOCIETY	JUL	2 WKS	S-C
ROLLIN ARTS CENTRE-SUMMER PROGRAM	JUL-AU	2 MONTHS	S-C
SALMON FESTIVAL & DERBY	SEPT	3 DAYS	REC
WATER SPORTS DAY	JULY	1 DAY	REC
WINTER CARNIVAL	FEB	WK-END	S-C
WINTER CRAFTSFAIR	NOV	WK-END	S-C

BAMFIELD AND AREA

ACCOMODATION	NUMBER OF UNITS	WITH KITCHEN	SWIMMING POOL	BAR/ LOUNGE	RESTAURANT RESTAURANT	CONFERENCE/ BANQUET	SEASONAL YEAR-ROUND	RATING RATING
AGUILAR HOUSE	7U	*			FAMILY MEALS		S	*****
BAMFIELD CABINS	3U	*					S	**
BAMFIELD TRAILS MOTEL	23U	*					Y-R	***
PACHENA BAY CAMPSITE	25CS						S	**
SEABEAM LODGE	60CS						S	**
KINGFISHER CHARTERS	1U	*					Y-R	***

RESTAURANTS	FASTFOOD	FAMILY	RATING
FISHER BUOY CAFE	*		***
WHEELHOUSE DINING ROOM		*	****

ATTRACTIONS	SEASONAL	YEAR-ROUND	TYPE	MARKET	ATTRACTIVITY	RATING
BAMFIELD MARINE BIOLOGY STATION		Y-R	S-C	ADULT	LOC-REG-PROV-NAT-US-INT	****
BRADY'S BEACH		Y-R	NAT	FAMILY	LOC-REG-PROV	****
CAPE BEALE LIGHTHOUSE		Y-R	HIST	FAMILY	REG-PROV	****
PACIFIC RIM NATIONAL PARK:						
BROKEN GROUP ISLANDS		Y-R	NAT	FAMILY	LOC-REG-PROV-NAT-US-INT	*****
PACHENA BAY		Y-R	NAT	FAMILY	LOC-REG-PROV-NAT-US-INT	*****
WESTCOAST TRAIL		Y-R	NAT	ADULT	LOC-REG-PROV-NAT-US-INT	*****

SERVICES

BOAT CHARTERS/RENTALS	SEASONAL	YEAR-ROUND	MARKET
KINGFISHER CHARTERS	*		FAMILY
SEABEAM LODGE	*		FAMILY

KEY TO ABBREVIATIONS AND SYMBOLS USED IN THE PRECEEDING TABLE

UNDER THE CATAGORY "NUMBER OF UNITS"
- CS= CAMPING SITES
- TS= TRAILER SITES
- U= UNITS

UNDER THE CATAGORY "RATING"
- *= ACCEPTABLE
- **= GOOD
- ***= QUALITY
- ****= GOOD QUALITY
- *****= HIGH QUALITY

NOTE- THESE ARE COMPARATIVE RATINGS AND ONLY APPLY WITHIN THE REGION.
- THEY ARE BASED UPON THE JUDGEMENT OF THE CONSULTANT AND TAKE INTO CONSIDERATION SUCH FACTORS AS LEVEL OF ATTENDANCE, GENERAL AMBIANCE AS A FACILITY, QUALITY OF FOOD, CLEANLINESS, AND THE FACILITY'S DESIGN RELATIVE TO ITS SETTING.

UNDER THE CATAGORY "TYPE"
- NAT= NATURAL
- HIST= HISTORICAL
- S-C= SOCIAL/CULTURAL
- REC= RECREATIONAL
- IND= INDUSTRIAL

UNDER THE CATAGORY "ATTRACTIVITY"
- LOC=ATTRACTIVE TO LOCAL TOURISTS
- REG=ATTRACTIVE TO REGIONAL TOURISTS
- PROV=ATTRACTIVE TO PROVINCIAL TOURISTS
- NAT=ATTRACTIVE TO NATIONAL TOURISTS
- US=ATTRACTIVE TO UNITED STATES TOURISTS
- INT=ATTRACTIVE TO INTERNATIONAL TOURISTS

UNDER THE CATAGORY "ATTENDANCE"
- CA= CAMPERS
- DU= DAY USE

APPENDIX III

TYPICAL INTERVIEW QUESTIONS

Private Operators

1. How many years in operation?
2. Probable rate of occupancy/use etc.
3. Perceived markets
   - to their facility
   - to their municipality
   - to the region
4. Definition of recent changes in local tourism situation.
5. What are major draws to region?
6. What are the impacts of seasonality, weather, government policy, transportation, regional promotion on your facility?
7. What changes will you be making to your product over the next few years?
8. Do you work closely with other members of the industry?
9. What would you like to see to improve the tourism industry in your sector (motel, restaurant, etc.), municipality, Alberni-Clayoquot?
10. What would you like to see in the Regional Tourism Strategy?

Parks Canada

1. What has been the impact of the Pacific Rim National Park (local, regional)?
2. What is the attitude towards tourism in terms of policy, master planning, park programming?
3. What do you perceive as the markets to the park, the Ucluelet, Esowista Peninsula, the region?
4. What are the short term and long term park developments? Will budget restraint impact upon the existing master plan?
5. How do you perceive the development of tourism in the overall region?
6. How to foresee the future of tourism development in the region?
7. What are your opinions on; Role of Provincial Parks, Meares Island, logging approach and standards, quality of private campgrounds, etc?
8. What would you like to see in the Tourism Strategy?

Municipal Councils/Mayors

1. How has tourism affected your municipality in the past 5 years, 10 years?
2. How have citizens, small business, provincial government and municipal council reacted to increased tourism?
3. How has your community accepted the National Park, proposed infrastructure, Harbourfront, salmon fisherman, etc. (depending on community)?
4. How would increased tourism be received by the community and how would you go about it?
5. What do you consider as your main resources (within the community, the immediate area)?
6. How would tourism integrate with other industries?
7. What would you like to see to improve tourism?
8. What would you like to see in the Tourism Strategy?

Ministry of Forestry

1. How do you perceive the relationship between tourism and forestry?
2. What will the impact of your various 5 year plans be?

Ministry of Lands/Parks/Housing (Parks Branch)

1. How do you perceive your role as providers of tourism?
2. What are your short/long term development objectives for within and around the region?

APPENDIX IV
PARTIAL INTERVIEW LIST

1. TRAVEL INDUSTRY OPERATORS

UCLUELET

Ted Walker	Ucluelet Lodge Hotel
Bob Wright	Canadian Princess
Miles Roseborough	Canadian Princess
Beverley Stewart	Tradewinds Aviation
Elling Reiter	Bay Shore Marina
Lorenzo Corrolazzoli	Pacific Rim Motel
Marc Noel	West Coast Motel
Eddie Tang	Whales Tale Restaurant
Jana Sakish	The Windfish
Bert Parks	Da-Quah Gallery
Norm Ayres	Da-Quah Gallery

TOFINO

Roy Vickers	Eagle Dancer Galleries
Betty Brosman/Chris Douglas	Dolphin Motel
Gloria/Jack Bruce	Schooner Inn
Al Pineo	Clayoquot Lodge
Joseph Rafferty	Duffin Cove Motel
Howie McDermaid	Surf Shore Estates
Bob Ford	Ouan Village
Bill Petinger	Pacific Rim Resort
Allan Nikiforuk	Loft Restaurant
Harry Teilman	Happy Harry's
Greg Trenholme	Pacific Rim Airlines
Hans Huebuer	Apaloma Hotel
Rita Driner	Island Gift Gallery
Dennis Klee	Pacific Rim Campground
John English	Pacific Rim Campground
Hector Bradham	Crystal Cove Campground
Bert Driner	Berts Boat Charters
Marcel Charbonneau	West Coast Gift Shop

BAMFIELD

Marg Peel	Aquilar House
Bob Peel	Aguilar House
Bill Mather	Bamfield Cabins
Tom Christiensen	Bamfield Trails Motel
Art Peters	Pachena Bay Campground
Al Benton	Fisher Buoy Cafe
Bill Petch	Kingfisher Charters
Garry Jackson	Barkley Sound Resources
Linda Jackson	Barkley Sound Resources
Jack Graham	Seabeam Lodge

PORT ALBERNI

Brian Fryer	Tumberlodge Motor Inn
Brook George	Lady Rose
Mo Inward	CJVA
Bea/Mack Elliot	Esta Villa Motel
Steve Lazachuck	Barkley Hotel
Brian Congdon	Subtidal Adventures
Dave Christie	Rendervours Dive Charters
Peter Myer	Pacific Sea Ventures
Jennifer Flynn	Coastal Adventures
Jim Moreau	Lady Rose

2. GOVERNMENT

Don Brookes	Port Alberni Harbour Commission
Joe Stanlope	ILAP
Ken Hutchinson	Economic Development Commission
Susan McFarlane	Economic Development Commission
Doug Brimacombe	Port Alberni Parks Department
Jonn Hussey	Ministry of Tourism

Craig Strukland	Ministry of Tourism
Mick Collins	Ministry of Tourism
Doug White	Ministry of Tourism
Vern Treichel	Tourism B.C. Seattle
Roger Wilson	Pacific Rim National Park
Howie Hambleton	Pacific Rim National Park
Bill MacIntyre	Pacific Rim National Park
Heather Clues	Pacific Rim National Park
Barry Campbell	Pacific Rim National Park
Peter Mastresov	Parks Canada - Calgary
Ted Perry	Hatcheries, Fisheries, Oceans
Rus Campbell	B.C. Forest Services
Ron Lampard	B.C. Parks Branch, Regional Director
Brian Dyck	Lands, Parks and Housing Parks and Outdoor Recreation Division
Win Stokes	Regional Economic Expansion
Don McCullan	Department of Fisheries and Oceans
Dave Raven	Ministry of Transportation and Highways
Norm Brook	Ministry of Forests

3. POLITICIANS

Penny Barr	Mayor, Tofino
Ron Burley	Mayor, Ucluelet
Paul Reitsma	Former Mayor Port Alberni
Gillian Trumper	Mayor Port Alberni
Art Wynan	Alderman, Port Alberni
Town Council	Ucluelet
Town Council	Tofino
Whitey Bernard	Alderman, Tofino
Don Brookes	Harbour Commission Port Alberni
Al Davison	Alderman, Ucluelet

4. COMMUNITY

Shirley Stephens	Port Alberni Theatrical Society
Meg Scoffield	Bollin Arts Center
Pat Garcia	Bamfield Advisory Planning Commission
John Boom	Bamfield Advisory Planning Commission
Charlie Haggard	Alberni Salmon Charter Association
Rose Davison	Ucluelet Chamber of Commerce
Olivia Mae	Tofino Chamber of Commerce

5. NATIVE

Ernest Reider	Tribal Council
Stewart Adams	Tribal Council (Consultant)
Howard Thom	Clayoquot Band Council
Tom Curley	Clayoquot Band Council
John Rivard	Native Brotherhood
John Martin	Clayoquot Band Council

6. ADDITIONAL

John Hamilton	West Coaster
Ted Turner	B.C. Research
Lloyd Pruden	B.C. Travel Guide
John Brinsteed	Outward Bound (Vancouver)
John Dowd	Ecomarine Ocean Kayak
Barry Keyes	Mavrick Coachlines
John Dunn	Ecosummers Ltd.
John King	Mt. Arrowsmith Ski Association
	Parksville Tourism Association

Plus members of the Alberni-Clayoquot Regional Tourism Strategy Steering Committee.

APPENDIX V

PACKAGE TOUR MARKET TRENDS

1. Overview

Since their establishment in the 1960's, package tours have steadily grown in importance to all aspects of Canadian tourism. It is commonly perceived as a growth opportunity for both travel volume and type of tour package offered.

A number of factors contributed to the popularity of packaged tours but the single largest factor was the airlines participation in creating packages in order to promote their inventory of seats. This not only widened travel options and destinations but also increased the market size.

Package tours have several key advantages for the traveller including discounted rates for transportation and accommodation, convenience of one-time payment for all or most travel services, ease of vacation planning, and more travel opportunities.

Despite the popularity and increasing importance of package tours, there has been little documentation of its growth. Canadian Vacation Patterns Surveys indicated an increase of 66% from 1977 to 1979. There were an estimated 222,000 vacationers taking package tour vacations in Canada by mass modes in 1977 increasing to 338,000 in 1978 and 370,000 in 1979.

TABLE A
Growth In The Proportion Of
Public Carrier Trips On Package Tour

	1971	1978	1979	1980	1981
			(000s)		
1+ Nights in Canada	94	225	245	222	260
Canada Only	--	154	163	143	222
Canada & Other	--	71	82	79	38
U.S. Mainland	86	293	380	315	317
Offshore	58	471	367	476	340
Proportion of Total Public Carrier Trips to Canada	8%	12%	13%	13%	13%

Source: Vacation Travel By Canadians in 1981, CGOT

The proportion of total of public carrier trips on package tour has been steady at 13% per year for Canadian destinations; for trips to the U.S. it is double this amount at 26%. The proportion of package tours offered to offshore destinations fluctuates widely from year to year. However, the rate is high, between 30% and 40% per year.

2. Destinations in Canada

The Alberta-British Columbia region is the most popular destination area in Canada. In 1980, 41% of all Canadian tours were to this area. Ontario was the destination for 20% of all package trips and Quebec represented 16%. However, Quebec accounted for nearly one-third of the new package tours which indicates its increasing popularity as a tour destination area. Quebec and Ontario are the most popular destinations for travellers from the United States, Mexico and France. Western Canada tours tend to attract German, British and Japanese travellers.

TABLE B
Number of Canadian-Produced Package Tours
Spending One Night or More in Each Region of Canada
Spring-Summer-Fall 1979 and 1980

Destination	No. of Packages 1979	1980	% Growth	% of Total 1979	1980
Yukon-Northwest	74	82	10.8	7.4	6.4
Alberta-B.C.	459	524	14.2	45.9	40.6
Sask.-Manitoba	49	80	63.3	4.9	6.2
Ontario	195	259	32.8	19.5	20.1
Quebec	117	210	79.5	11.7	16.3
Atlantic Canada	105	136	29.5	10.5	10.5
Canada Total	999	1,291	29.2	100.0	100.0

Source: L.J. D'Amore & Associates Ltd. (TOURSCAN)

Scenic tours, the most popular of all types of package tours, also tend to focus on the Alberta-B.C. region due to the grandeur of the Rocky Mountains. Most of these tours originate in Western Canada although 28% are from Ontario and

11% from Quebec. Quebec and Ontario together account for over half of the entire market for scenic package tours in Canada (Quebec represents 23% and Ontario 31%). However, these provinces are destination areas for only one-quarter of all Canadian scenic tours. Central Ontario may not have the spendour of the Rockies but it is certainly well endowed with scenic vistas which present an opportunity for package tours.

Table C
Scenic Package Tours (Escorted)
in Canada, by Region, 1981

	ORIGINS		DESTINATIONS	
	No. of Tours	% of Total	No. of Tours	% of Total
Altantic	172	11.2	386	25.2
Quebec/Ontario	815	53.2	384	25.1
Man./Sask.	77	5.0	49	3.2
Rest of Canada	467	30.5	712	46.5
Total	1,531	100.0	1,531	100.0

Source: Package Tour Index, CGOT, 1981

3. Characteristics of Package Tours

Package tours are diverse not only in destination but also in duration, transportation, and activities. They range from one-day excursions to weekend trips to extended vacations. They use all modes of transportation, frequently combining several modes, and all types of accommodation from tents to luxury hotel suites. The key distinguishing characteristics are the tour's orientation, level of quality, and activities included in the package -- the possibilities are seemingly endless.

Package tours may be classified into five categories: scenic tours, city tours, adventure packages, outdoor recreation packages and special interest packages.

Scenic and city tours may be thought of as general sightseeing expeditions. They both entail tours of

attractions and places of interest but city tours would tend to be shorter in duration and focussed on an urban area. These are very popular packages because they require little prior knowlege and skills on the part of the traveller; for a visitor they present an opportunity to see the special features of an area without expending a lot of time and energy in the process. These packages include motorcoach tours, rail tours, motorcycle touring, honeymoon packages, entertainment/special events, and scenic drives in rented vehicles with or without itineraries.

Adventure and outdoor recreation packages emphasize outdoor activities and sports. Adventure packages generally have activities requiring well developed skills such as mountain-climbing, dog-sledding or deep sea diving. Outdoor recreation, on the other hand, focusses on more popular types of activities such as fishing, camping and skiing. In 1981 more fishing vacations were offered in Canada than any other type of outdoor recreation package, three-quarters of which originated in Manitoba/Saskatchewan. Rafting trips and trailriding were the second most popular type of tour. Tours that originated in Quebec focussed on recreational vehicle camping, canoe camping and fishing vacations.

Special interest packages are designed for a specific group and cater exclusively to the cultural, hobby and other needs and interests of that group. They may be oriented towards professional associations, religious groups, convention participants or any group with a shared interest. The attractions and activities included in the package are related to the particular interests of the group.

As can be seen from Table D, the largest growth areas in Quebec are in scenic tours and special interest packages. The rate of growth in Quebec's outdoor recreation market was only 3.4% in the 1979-1980 period but it is the third most popular type of tour. Outdoor recreation package destinations are mostly to the Alberta-British Columbia and Yukon-Northwest Territories regions. City packages on the other hand have had their greatest growth in central and eastern Canada destinations.

4. Traveller Characteristics

The lack of data on package tours is also in evidence for the package tour traveller. Any surveys that have been made provide only broad generalizations rather that specific characteristics for each type of package. A recent survey by L.J. D'Amore & Associates Ltd. (TOURSCAN) indicates that overall:

- the predominant markets are the singles and couples
- the singles market is expanding
- package tours do not appeal to families or single parents
- package tours attract the upper to middle income segments
- the purchasers of these tours tend to have professional or managerial occupations

British studies (1971) of the package tour market revealed it to be relatively small, clearly defined and constant in support. Package tours sold most easily to young single people, young married couples without children and "empty-nesters" or older couples travelling without children. It was also found that the market for package tours was expanding to include business travellers; "...commercial companies have been booking package holidays for groups of their personnell who attend conferences at the inclusive tour resort." ("Package Tours: Where Are They Heading?", International Tourism Quarterly, 1971)

Surveys of bus tour markets revealed travellers to be generally middle-aged and older and married. A 1980 U.S. survey indicated that 41% of the travellers took at least one trip per year and 43% took two or three trips per year. Bus tours definitely attracted the mature market but it was noted that the school market was rapidly growing.

However, the elements of the package, i.e. the duration, destination, and activities, are the most influential factors in determining the market profile. A ski-oriented package will, for example, attract skiers whereas a scenic drive in the county will attract the mature, less active individual. The strategy of U.S. bus tour operators to attract younger, high-income clientele, family and professional groups was to offer more intermodal tours, special interest programs, and expanded itineraries which combine sightseeing with amusement/theme parks, boat trips, etc.

One of the most important features of the package tour to

travellers is value without compromising on quality. Travellers expect good value for their vacation dollars and often choose package tours for the discounts offered on accommodation, services and admission costs. About 76% of vacationers on Canadian destination packages believed the package was a "good deal", 21% of which thought they had a "very good deal". (CROP Advertising Awareness Survey, 1980) The Canadian Vacation Patterns Survey in 1979 indicated that 16% of travellers perceived Canadian packages to be a better value than U.S. packages (Canada's major competition), and 30% though they were about the same value. Vacationers also believed Canadian packages had improved in value in 1979 over 1978.

APPENDIX VI

GLOSSARY OF TOURISM TERMS AND DEFINITION

Glossary

The following words are used throughout the text and refer specifically to Alberni-Clayoquot. Where possible they are given similar definition to those used by TIDSA and provided in "Regional Strategies".

1. Tourism

   The travel, activities and services used by any British Columbia resident beyond a 40 km (25 miles) radius from home for the purpose of personal enjoyment. Also, the travel, activities and services used by non-residents who enter the province for any reason other than work. It is recognized that elements of tourism are often involved when people travel for business purposes.

2. Tourist

   Individuals from outside the Alberni-Clayoquot Region travelling in the region for the purpose of touring, business or personal reasons.

3. Excursionist

   Day-use or same-day visitors who enter the region and leave the same day.

4. Tourism Destination Area

   A distinct geographic area containing one or more tourism destination resorts integrated into a network of supporting facilities, attractions and events reflecting, through developments and programs, one or more of the area's dominant historic or natural themes. The developments and programs may be oriented to one or more major seasons and may attract a broad range of market segments depending upon the quality and quantity of tourism amenities available.

5. Regional Destination Area

This is a distinct geographic area which offers a sufficiently wide range of facilities, attractions, activities and events during one or two main tourism seasons that will attract provincial and regional market segments (and adjacent U.S. and Alberta visitors) who spend the major part or all of their vacation trip within this particular area. Examples of established regional destination areas are the Okanagan Valley, the Columbia/Windermere Lakes area and Fernie/Crowsnest Pass Area.

6. Four Season Tourism Destination Area

A distinct geographic area containing an integrated network of tourism destination resorts and supporting tourism developments offering a wide range of facilities, attractions, activities and events on a year round basis, reflecting through either the developments or programs, the area's dominant, historic and natural themes. Accessible by major transportation modes along several travel corridors, the area attracts a broad range of international, provincial and/or regional market segments.

In a four-season tourism destination area, the tourism industry is the primary employer and the major source of income for the residents of the area, and there is a strong commitment by the local residents and the relevant municipal governments to stimulate the growth and development of the tourism industry.

7. Regional Tourism Service Centre

A community offering many services to the tourist but with a somewhat limited variety of types and qualities of accommodation facilities, food, beverage and night entertainment facilities, grocery and other retail facilities, gasoline and automobile service facilities, banking facilities, a regional tourism information centre and other related facilities. Port Alberni is a Regional Tourism Service Center.

8. Local Service Centre

A community offering a limited range of essential services to the tourist including accommodation facilities, food and beverage facilities, grocery and other retail facilities, gasoline and automobile service facilities, banking facilities, a local information centre and other related facilities, e.g. Ucluelet, Tofino.

9. Regional Travel Corridor

A paved or unpaved route linking destination areas and natural or historic attractions with local or regional service centres and areas that are of regional significance. Route 4 in the Alberni-Clayoquot is an example of this type of corridor.

10. Tourism Destination Resorts

An establishment offering in one complex under single management, a reasonable range of man-made and/or natural recreational amenities and support facilities including accommodation, food and beverage services.

a) Summer Resorts

Water or land-oriented facility complexes providing natural and/or man-made recreational amenities and activities for overnight or long-stay visitors during the summer, with possible extensions into spring and fall shoulder seasons.

b) Winter Resorts

Primary a land-oriented facility complex offering a variety of natural or man-made recreational amenities and activities for overnight and long-stay visitors during the entire year.

c) Campground Resorts

A campground that appeals to the complete camping market and is associated with an attraction such as a theme park, a water park, a slide, etc.

d) Upscale Accommodation

Lodging facilities that appeal to the more affluent visitors. A destination resort that includes a fine restaurant as well as a variety of recreation facilities popular with the middle to upper income groups.

11. Tourism Attraction

A physical feature of outstanding interest which can be either natural (Pacific Rim National Park) or man-made (Canadian Princess in Ucluelet). There may or may not be facilities constructed to enable fuller enjoyment by visitors. The attraction may be of international, national, provincial, regional or local significance depending on its ability to attract tourists from those market segments.

12. Tourism Event/Festival

A transitory man-made occurrence, celebration of activity of considerable interest and notability that is usually (but not always) held on an annual basis, for example, theatre events, folk festivals, dog show. They can be of international, national, provincial, regional or local significance depending on the markets that are attracted (competitors/spectators).

13. Tourism Facility

An establishment whose primary purpose is to offer a particular service or recreation activity opportunity to the tourist. Services may include accommodation, food, beverage or automotive services and while recreation activity opportunities can range from ski developments to tennis courts, from a marine to an information centre.

14. National Park

Part of a system of outstanding and representative natural areas of Canadian significance administered by Parks Canada. The purpose is to provide opportunities for public understanding, appreciation and enjoyment of the natural heritage so as to leave it unimpaired for future generations. There are five national parks in British Columbia at the present time.

15. Provincial Park

Part of a system of outstanding and representative natural areas with a high recreational capability of national, provincial and regional significance administered by the Ministry of Lands, Parks and Housing, Parks Branch. There is a classification system of six types whereby parks are managed for various intensities of recreational use on a continuous basis ranging from those primarily intended for preservation of undeveloped natural systems and low intensity recreation, to those developed to accommodate intensive recreation activities, for example, beaches, boat launching areas, campgrounds, etc.

16. Marine Park

Coastal areas in the high recreational boating capability developed by the Provincial Parks Branch. They are developed to provide essential facilities for the enjoyment of the boating public while striving to maintain the attractiveness and integrity of the natural surroundings. Inland lakes and reservoirs are also included in this program.

17. Markets

a) International Market

Residents of an overseas country having a propensity to travel to British Columbia (partially or entirely for personal enjoyment).

b) U.S. Market

Residents of the United States of America having a propensity to travel to British Columbia.

c) Canadian Market

Residents of the Canadian provinces and territories other than British Columbia having a propensity to travel to British Columbia.

d) Provincial Market/Resident Market

Residents of British Columbia having a propensity to travel in British Columbia.

e) Regional Market

Residents of regions within British Columbia having a propensity to travel within the confines of that region for the purpose of personal enjoyment.

f) Local Market

Local residents having a propensity to use nearby (one-half to one hour driving time) tourism and recreation developments for the purpose of personal enjoyment.

g) Primary, Secondary and Tertiary

Primary - Vancouver Island, Vancouver and Lower Mainland
Secondary - Alberta, Washington and Oregon State
Tertiary - Remaining Canadian, U.S. and International Markets

18. Receptive Tour Operators

Those members of the travel industry that organize comprehensive tour packages (lodging, attractions, transportation, entertainment and food services) that appeal to mass and specialized tour groups of varying size.

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